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HOUSE MUSEUMS: WHO'S MINDING THE SITE?

**A STUDY OF
THE ATTRIBUTES OF PROFESSIONAL
HISTORIC SITE DIRECTORS**

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Introduction

An article published in 1989 by historian and museum consultant Gerald George, pointed out that converting an historic building into a museum is only the start of saving it. His research showed that an alarming percentage of historic sites nationwide, which were constructed as houses and were later converted to museums, were attempting to support museum service operations on shoestring budgets, with no on-site professional help.¹ Yet, a smaller group of these properties do benefit from professionally trained executive directors who work to coordinate site activities and lead the operations forward in some fashion. While the leadership of any executive director is not independent of the influence and support of the organization's governing body, a properly trained and effective director should have a significant influence on the administration and success of the site.

In the Delaware Valley, there is an unusually high density of historic house museum properties, many of which employ a professional director. This study focuses on the characteristics of those directors of a group of thirty-five properties in order to identify the relationship between professional training and effective management at the small historic house museum. It records information on recent trends in site museum management as reflected in the approaches of the participants in the study group.

Specifically, what sort of people are professional site directors? The study will examine what training and experience each member of the study group brought to his or her current position. It will identify what difference, if any, professional training has

made to each site. While the material begins with a foundation of detail data as a means of comparison, the broader goal will be to identify recurrent themes, of both managerial problems and accomplishments, from the responses of the participating executive directors. In so doing, the study will analyze the effect professional directors may be having as a whole within the larger community of historic house museums.

Methodology

In order to learn about the characteristics of the site directors in the Delaware Valley, a questionnaire was written, addressing four primary areas. These included basic facts about the properties; the educational and experiential background of the director at each site; the philosophy and opinions of the director; and a look at the collective opinions of the directors interviewed regarding anticipated trends in the house museum world. Using this questionnaire, interviews were conducted in person and by telephone over the months of February, March and April of 1994. A total of thirty (30) directors participated, representing sites in Pennsylvania, New Jersey and Delaware.

Three of the directors interviewed manage more than one house; the rest each administer a single house museum. The properties they administer have a wide range of attributes, from differences in levels of visitation and budget, to philosophy of management. The study group should not be considered a representative segment of the historic house museum inventory nationwide, though the challenges they encounter daily are probably typical of the problems facing most house museums today.

Initially, over two-hundred historic house museum sites were identified in Philadelphia, southern New Jersey, and Delaware. The list was narrowed in order to focus on those directors who were believed to have demonstrated a certain level of focus and leadership at their sites in the past. They were chosen in order to find out what that leadership really meant, and what might have influenced it. All of the participants generously shared their time and insights concerning their individual properties, resulting in both comparative data and anecdotal commentary that is presented and analyzed as a result of this study.

In fact, because the focus of this study is the impact of professional training on issues of management and leadership, the properties were specifically chosen based on the initial assumption that each employed a staff person who could be identified as a professional director. In this context, the phrase “professional director” refers to the one paid full-time employee, with primary oversight responsibilities and decision-making authority for the house museum. The director orchestrates the daily activities, administration and management that make it possible for the site to be open to the public. This person generally reports to a board of directors or similar governing body. The professional is expected to have completed training and employment experience in a discipline pertinent to house museum management, and ideally in historic preservation if the sites are to become effective as preservation alternatives. Not all of the participants proved to be professional staff as strictly defined, reflecting the changes and problems that occur at any work place over time. Specifically, three of the participants were board

officers of the governing organizations at sites which had recently employed staff, but were no longer able to support a full-time director; one interviewee was a member of the board sustaining an all-volunteer managed property.

Visitation

Museum properties are open to the public, in some capacity, even if only by appointment. The American Association of Museums (AAM) requires museums to be open to the public for at least 1,000 hours each year as a minimum qualification for accreditation.² In theory, house museums exist for purposes of educating the public about the time period and history represented by the structures and collections at their sites. Thus, a study of historic house museums might expect to find high visitation counts since the properties exist to serve a public constituency's needs. This would be a misconception in many ways.

This study group was found to serve a total of 758,450 visitors annually, according to the figures provided by the interviewees. This probably referred to counts applicable to the year 1993 (interviews conducted in 1994) as most directors base any given quote on the last year's known head count. While the average annual visitation was a little over 22,000 per site, the median of the group was only 6,000 per year. This indicates an extremely wide spread between the lowest level (Parson Thorne Mansion at 350 per year) to the highest (Betsy Ross Memorial at 300,000 per year.)

Only three properties in the study group exceeded 50,000 visitors per year. The

remaining distribution included 23% of the study group hosting fewer than 5000 guests; 29% of the sites received 5000-10,000 visitors; 23% received 10,000-15,000, and 15% of the group received between 15,000 and 55,000 visitors. The range of figures is displayed in Table 1.

For purposes of comparison, this study group proved roughly similar to a national survey conducted in 1989 by the City of Campbell, California. At that time, 60% of house museum sites reported fewer than 10,000 visitors per year; 32% reported over 10,000 per year.³ This Delaware Valley study group reported 66% of the sites with fewer than 10,000 visitors per year; 31% over 10,000 per year.

Table 1: Annual Visitation

Property Name	Visitors Per Year
Parson Thorne Mansion	350
Dickinson/Albertson Farmstead	600
Conrad Weiser Homestead	1,100
Stenton	1,700
Wyck	2,200
Harriton House	3,000
Maxwell Mansion	3,500
Pomona Hall	4,000
Thomas Clarke House	5,000
Whitman/Stafford House	5,000
Landmarks: Powel House	5,000
Landmarks: Hill-Physick-Keith House	5,000
Landmarks: Grumblethorpe	5,000
Landmarks: Waynesborough	5,000
Pottsgrove Manor	5,500
Pennypacker Mills	5,500
Hendrickson House	5,500
Historic Fallsington	6,500
Highlands	10,000
Bartram's Garden	10,000
Trent House	10,000
Hope Lodge	10,000
Graeme Park	10,000
RittenhouseTown	10,500
Pearl S. Buck House	13,000
Cliveden	15,000
Colonial Pennsylvania Plantation	17,000
Rockwood	20,000
Fonthill	21,000
Read House	25,000
Elfreth's Alley	50,000
Pennsbury Manor	55,000
Carpenters' Hall	112,500
Betsy Ross Memorial	300,000
Thomas Massey House	unknown
Total Visitation:	758,450
Median:	6,000

The need to bring more visitors to a property can become a significant aspect of a director's responsibilities unless a site can afford specialized marketing support in some form. The director at Historic Bartram's Garden explained that she saw an immediate benefit upon the hiring of a part-time marketing coordinator as a member of her staff. "I can't say enough about how important this is for the survival of the site. You need a separate public relations spokesperson because the director can't write all the grants, handle all the administrative details, and do marketing as well, let alone do it with any degree of success." Interestingly, Martha Wolf quantified the success of a stepped-up marketing focus by describing increases in rental revenues for special occasions at the site, rather than through a direct upswing in visitors.⁴

Martha Wolf was not the only director who viewed visitation as a loss-leader, rather than a true source of funds. In the case of The Highlands, Catherine Hoffman-Lynch explained that they don't anticipate any true revenue from the walk-in visitation they receive, but are more interested in the possibility of securing future rentals from visitors who see the property and decide to return for their private events.⁵

It is important to note that visitors, for all the spending money they bring to an historic house museum, also bring troubles which the site director must plan to handle. The National Trust in the United Kingdom was one of the leaders in recognizing the contradictions between the preservation of historic structures versus the need for public access. According to a recent analysis of The National Trust's policy, "The long-running debate is incapable of easy resolution. The Trust must achieve both, but preservation

comes first, as the founding documents and the Trust's title make clear. Otherwise there is nothing to access." Discussions with the directors in the Delaware Valley indicated that the issue of visitation was a carefully approached topic, and not presumed to be the great solution to the funding challenges of the sites.

According to John M. Groff, Director at Wyck in Germantown, there is a real benefit to slow and carefully planned growth in visitation. Wyck currently hosts approximately 2,200 visitors per year, yet he recognizes that it is a small site better suited to a specific audience than to heavy traffic for the sake of generating high visitation counts.

The analysis is tied to the mission of the site as educational. Are we accessible to scholars, neighbors, the general membership? This is partially attendance, but also a quality issue. The grant agencies are coming to understand this. These (houses) are not expendable resources, and if the goal is to pack in as many people as possible, we will destroy the resource. It goes to the issue of balance. We are open to the public but seek to bring in the people who will benefit from the experience. Personally, I would like to increase the visitation to about a limit of three-to-four thousand per year; but I'm not moving too fast to do so.⁶

Despite sensitivity to the structures and their inability to tolerate high levels of traffic, at some sites the revenue from visitors is so important that it can obscure the educational mission in favor of money, pure and simple. According to Gayle L. Petty of Elfreth's Alley, quality of presentation to the visitor is paramount, though her board has a tendency to focus on the number of admissions purchased. In Ms. Petty's view:

You can't just have people flow through the place. You must interpret and educate. Quality is more important than great numbers of people not knowing what they've seen. This idea is a real turnaround for my board, to focus on a real museum experience. It includes well-trained guides, who

are skilled in crowd interaction, and having people leave with a bit of knowledge about Philadelphia, the alley and its evolution. Mere numbers aren't the key. That is my opinion, however, and not necessarily the board's. Their focus may be more numbers driven because of the gate as a revenue source. But you can't raise funds from outside sources without being able to say what you're giving those visitors.⁷

Visitors thus represent not only a measure of numbers-served, but also the balance that must be struck between managing them productively for the site's needs versus managing the site to meet their needs.

Staffing

While the sites in this study were selected on the presumption of full-time professional staffing, approximately one-third of the properties did not meet this criterion. The reasons vary, including properties, such as Graeme Park and Hope Lodge, under the umbrella of a larger organization and operated with a shared director; sites such as Dickinson / Albertson Farmstead which had previously employed a director and retrenched due to insufficient operating funds; and sites, such as Harriton House and Stenton, which employed professional directors, but could only afford to do so on a part-time basis.

Altogether, the properties in the sample group are operated with the support of a total of sixty full-time paid staff; fifty-six paid part-time staff (year round); six part-time staff (seasonally); seven live-in caretakers; and over eight-hundred volunteers. When ranked in order of the budget available to the sites, it was not surprising that those sites

with the larger budgets also employed more personnel to meet the voracious labor needs of publicly open houses. Staffing figures are detailed in Table 2.

Table 2: Staffing

Property Name (In order of highest operating budget to lowest)	Paid FT Staff	Paid PT Staff (year round)	Paid PT Staff (seasonal)	Live-In Site Caretaker (Unpaid)	Unpaid Staff (Volunteers)
Pennsbury Manor	16	0	0	0	100
Philadelphia Society for the Preservation of Landmarks	1	2	0	4	80
Rockwood	6	6	0	0	80
Cliveden	2	3	0	1	not stated
Bartram's Garden	2	5	0	0	not stated
Hope Lodge	2	1	0	0	60
Betsy Ross Memorial	6	0	0	0	not stated
Pennypacker Mills	4	3	0	0	not stated
Pottsgrove Manor	4	2	0	0	not stated
Graeme Park	0	2	0	0	25
George Read II House & Gardens	4	1	0	0	16
Carpenters' Hall	1	1	0	0	10
Historic Fallsington	1	0	0	0	90
Wyck	1	1	3	1	20
The Highlands	1	2	0	0	60
Fonthill Museum	1	10	0	1	65
Historic RittenhouseTown	2	0	0	0	35
Colonial Pennsylvania Plantation	0	2	2	0	14
Elfreth's Alley	1	0	1	0	30
William Trent House	3	1	0	0	12
Conrad Weiser Homestead	1	2	0	0	0
Ebenezer Maxwell Mansion	1	0	0	0	40
Thomas Clarke House	1	1	0	0	10
Harriton House	0	1	0	0	not stated
Hendrickson House	0	1	0	0	not stated
Stenton	0	1	0	0	not stated
Dickinson / Albertson Farmstead	0	1	0	0	not stated
Whitman / Stafford House	0	0	0	0	6
Pomona Hall	1	7	0	0	not stated
Parson Thorne Mansion	0	0	0	0	20
Pearl S. Buck House	1	0	0	0	65
Thomas Massey House	0	0	0	0	not stated
Totals:	60	56	6	7	852

Governance

Of the thirty-five house museums included in this study, sixteen are operated as private, non-profit entities (46%); four are publicly owned and operated (11%); and the remaining fifteen (43%) are run in a cooperative public-private partnership of some form. The ramifications of the governance structure manifested themselves in different ways, which are reflected in comments throughout responses in other aspects of this study. Ownership and operating organizations are listed in Table 3.

Table 3: Governance Structure

Private, Non-Profit Entities: 16 Properties

Carpenters' Hall	Owned and operated by the Carpenters' Company of the City and County of Philadelphia, a private, non-profit organization.
Cliveden	Owned by the National Trust for Historic Preservation; operated by Cliveden of the National Trust, a private, non-profit organization, under a co-stewardship agreement.
Colonial Pennsylvania Plantation	Owned and operated by the Bishop's Mill Historical Institute, a private, non-profit organization.
Ebenezer Maxwell Mansion	Owned and operated by The Ebenezer Maxwell Mansion, Inc., a private, non-profit organization.
Elfreth's Alley	Owned and operated by private homeowners in cooperation with The Elfreth's Alley Association, a private, non-profit organization.
Fonthill Museum	Owned by the Bucks County Trust; operated by the Bucks County Historical Society, a private, non-profit organization.
George Read II House and Gardens	Owned and operated by the Historical Society of Delaware, a private, non-profit organization.
Hendrickson House Museum and Old Swedes Church	Owned and operated by the Holy Trinity Church, a private, non-profit organization.
Historic Fallsington	Owned and operated by Historic Fallsington, Inc., a private, non-profit organization.
Parson Thorne Mansion	Owned and operated by the Milford Historical Society, a private, non-profit organization.
Pearl S. Buck House	Owned and operated by the Pearl S. Buck Foundation, a private, non-profit organization.
Philadelphia Society for the Preservation of Landmarks	Three houses, Hill-Physick-Keith House, Grumblethorpe, and Powel House, are owned and operated by the Philadelphia Society for the Preservation of Landmarks, a private, non-profit organization. (A fourth house, Waynesborough, is a public-private partnership between Easttown Township and Landmarks, which leases and operates the site.)

Table 3: Governance Structure

Pomona Hall	Owned and operated by the Camden County Historical Society, a private, non-profit organization.
Wyck	Owned and operated by The Wyck Association, a private, non-profit organization.
Publicly Owned & Operated: 4 Properties	
Betsy Ross Memorial	Owned and operated by the City of Philadelphia.
Pennypacker Mills	Owned by Montgomery County; operated through the Montgomery County Department of History and Cultural Arts.
Pottsgrove Manor	Owned by Montgomery County; operated through the Montgomery County Department of History and Cultural Arts.
Thomas Clarke House	Owned by the State of New Jersey; operated through the New Jersey Department of Environmental Protection, Division of Parks and Forestry.
Public / Private Partnerships: 15 Properties	
Bartram's Garden	Owned by the City of Philadelphia; operated by the John Bartram Association, a private, non-profit organization.
Conrad Weiser Homestead	Owned by the Commonwealth of Pennsylvania; operated by the Pennsylvania Historical and Museum Commission, with an associated non-profit friends group.
Dickinson/Albertson Farmstead	Owned by the Pennsylvania Department of Transportation; operated by the Plymouth Meeting Historical Society, a private, non-profit organization.
Graeme Park	Owned by the Commonwealth of Pennsylvania; operated by the Pennsylvania Historical and Museum Commission, with an associated non-profit friends group.
Harriton House	Owned by Lower Merion Township; operated by The Harriton Association, a private, non-profit organization.
Historic RittenhouseTown	Owned by the Fairmount Park Commission of the City of Philadelphia; operated by Historic RittenhouseTown Inc., a private, non-profit organization.

Table 3: Governance Structure

Hope Lodge	Owned by the Commonwealth of Pennsylvania; operated by the Pennsylvania Historical and Museum Commission, with an associated non-profit friends group.
Pennsbury Manor	Owned by the Commonwealth of Pennsylvania; operated by the Pennsylvania Historical and Museum Commission, with an associated non-profit friends group.
Philadelphia Society for the Preservation of Landmarks	One house, Waynesborough, is a public-private partnership between Easttown Township and Landmarks, a private non-profit organization which leases and operates the site. (The Landmarks group also owns and operates three other houses privately, including Hill-Physick-Keith House, Grumblethorpe, and Powel House.)
Rockwood	Owned by New Castle County, Delaware; operated in partnership with the Friends of Rockwood, a private, non-profit organization.
Stenton	House & grounds owned by the City of Philadelphia and administered by the National Society of the Colonial Dames of America in the Commonwealth of Pennsylvania, a private, non-profit organization.
The Highlands	Owned by the Commonwealth of Pennsylvania, through the Pennsylvania Historical and Museum Commission; operated by the Highlands Historical Society, a private, non-profit organization.
Thomas Massey House	Owned by Broomall Township; operated by the Thomas Massey House Corporation, a private, non-profit organization.
Whitman - Stafford Farm House	Owned by the Borough of Laurel Springs, New Jersey; operated by the Whitman-Stafford House Committee, a private, non-profit organization.
William Trent House	Owned by the City of Trenton; operated in cooperation with the Trent House Association, a private, non-profit organization.

Budget / Endowments / Major Sources of Revenue

Money is an important topic for directors of historic properties. It poses a problem if you don't have it; and the more you have, the more you need in order to sustain the activity it fuels. As not-for-profit or public ventures, historic house museums are charitable institutions. There is a myth that by opening a house to the public, magical gifts of money will flow from private donors, foundations, the government, or all three. This appears to be rooted in the concept that good deeds will be rewarded on their merit. In fact, the act of opening a historic property to serve the public as a museum is costly, and one of the ways in which a director spends significant amounts of time is raising and attending to the finances of the operation.

The financial health of any organization can only be assessed by an in-depth review of numerous accounting reports; however, a quick look at the operating budget, level of endowment(s) if any, and identification of the major sources of revenue will provide a basic understanding of the finances at a single point in time. Just as visitation numbers fail to reflect the full story of how well a site serves the public, these figures only tell part of the tale. Nevertheless, certain data collected from this study sample will help to illustrate the situations facing many historic property museums.

The thirty directors interviewed manage a total, in operating budgets, of \$3,930,600. The budgets in the group range from a low of \$2,500 per year (Whitman / Stafford House, all volunteer) to a high of \$900,000 per year (Pennsbury Manor, state-funded site.) The median of the group was \$130,000 per year. These figures represent the annual funding

required to operate the property, and do not take into account additional sums of money for major capital expenditures. Of the group, nine properties have budgets under \$50,000 per year; ten operate between \$100K - \$200K; six are in the range between \$200K - \$500K; and only two properties operate on budgets that exceed \$500,000. Four of the directors interviewed did not know the budget figures for their sites, either because they were excluded from the budgeting process or because the budgets were engulfed within the larger budgets of their parent organization. Operating budgets by property are presented in Table 4.

Table 4: Operating Budgets

Property Name	Operating Budget	Additional Income	Total Revenues	Percentage Raised Ea. Yr.
Whitman/Stafford House	\$2,500		\$2,500	100%
Dickinson/Albertson Farmstead	\$22,500 ¹		\$22,500	100%
Stenton	\$30,000		\$30,000	unknown
Hendrickson House	\$35,000 ²		\$35,000	25%
Harriton House	\$40,000		\$40,000	95%
Thomas Clarke House	\$50,000 ³		\$50,000	unknown
Conrad Weiser Homestead	\$60,000		\$60,000	0%
Ebenezer Maxwell Mansion	\$72,000		\$72,000	20%
William Trent House	\$85,000 ⁴		\$85,000	5%
Elfreth's Alley	\$100,000		\$100,000	95%
Colonial Pennsylvania Plantation	\$105,000		\$105,000	100%
Rittenhouse Town	\$110,000		\$110,000	100%
Fonthill Museum	\$120,000		\$120,000	90%
The Highlands	\$142,000		\$142,000	50%
Wyck	\$92,000	\$50,000	\$142,000	85%
Historic Fallsington	\$150,000		\$150,000	33%
Carpenters' Hall	\$158,500		\$158,500	0%
Graeme Park	\$180,000		\$180,000	23%
George Read II House & Gardens	\$180,000		\$180,000	40%
Pottsgrove Manor	\$211,700		\$211,700	0%
Pennypacker Mills	\$213,900		\$213,900	0%
Betsy Ross Memorial	\$180,000	\$70,000 ⁵	\$250,000	0%
Hope Lodge	\$260,000		\$260,000	17%
Bartram's Garden	\$205,000	\$115,000 ⁶	\$320,000	50%
Cliveden	\$233,500	\$87,000 ⁷	\$320,500	15%
Rockwood	\$430,000		\$430,000	15%
Philadelphia Society for the Preservation of Landmarks	\$140,000	\$560,000	\$700,000	100%
Pennsbury Manor	\$900,000		\$900,000	50%
Totals:	\$3,608,600	\$322,000	\$3,930,600	
Median:	\$130,000	n/a	\$142,000	

Table 4: Operating Budgets

Property Name	Operating Budget	Additional Income	Total Revenues	Percentage Raised Ea. Yr.
Properties with Unknown Budgets:				
Thomas Massey House	Budget Unknown ⁸			0%
Parson Thorne Mansion	Budget Unknown ⁹			100%
Pomona Hall	Budget Unknown ¹⁰			unknown
Pearl S. Buck House	Budget Unknown ¹¹			unknown

1. Budget level typically varies from \$20K - \$25K.
2. Budget level typically varies from \$20K - \$50K.
3. Represents an educated guess, though the director is usually not shown the budget.
4. Represents an educated guess; site budget is bound within a larger organizational budget.
5. Other sources of income include employee benefits, utilities, etc. paid directly by the City of Philadelphia.
6. Other sources on income include services provided by the Fairmount Park Commission such as grass cutting, snow removal, etc.
7. Additional income refers to grant funds for specific project proposals.
8. "We have lost money and we are struggling at this point." Miriam Fitzgerald
9. "I can't tell what the budget is, but it's real low." Susan Emory
10. Part of a larger organizational budget.
11. Part of a larger organizational budget.

Just as a certain level of funding is necessary to make a success of the operation, the way in which money is reported can affect a property positively or negatively as well. One director was careful to distinguish between general operating funds and special project funding. He explained that they keep the pools of money separate as a basic fund accounting procedure. “Fund accounting is done to simplify the accounting, as well as in response to the trend by foundations toward percentage-based grants. The issue is to avoid competing with other sites that are out of our league because of inaccurately represented [overly large] budget totals.”⁸

Another interesting element of budget as a measure of the site is the difficulty in identifying hidden line items. This is frequently the case with publicly-owned properties or those governed as part of a public-private partnership. These sites may derive benefits from their governmental partner though they never appear as part of the budget figures. A good example is the Betsy Ross House, with a stated operating budget, according to Theobald M. Newbold, of \$180,000. Mr. Newbold clarified that this is a factual figure, but nevertheless understated, “due to the many hidden aspects, because the municipal government pays all the utilities and employee fringe benefits aren’t included. All shop sales are funneled back to the City treasury so there is no incentive to do anything with the shop (to improve or change it.) All told, it probably costs about \$250,000 to run the place.”⁹

The frustration of administering a publicly-owned property is consistently revealed in discussions regarding the budget. Some of the directors in this situation react

with apathy, choosing not to fight the system; others become creative in their alternatives, and openly invest more time and energy in those aspects of the site which generate unrestricted revenues for use as the director may deem necessary on behalf of the property. Mr. Newbold explained the challenge by comparing management within a public bureaucracy to the running of a small business. "In a small business, you can make a decision and then do what you've decided. In a non-profit or public institution, you make a decision and then must work through the bureaucracy. This becomes a disincentive to do 'experimental' things. It can be a stifling influence on creativity. This is less true within a non-profit (compared to a governmental organization), where you only have the board to worry about."¹⁰

The reverse approach can point to the benefit of a director who sees the glass as half full. At Rockwood, a property with significant funding from New Castle County, John Braunlein explained that the way the money flowed to the property became a source of opportunity for him to improve conditions at the property.

Early on, there was a shift in funding for the Earned Income account as the money was moved out of County control and into the hands of the Friends of Rockwood. Before this happened, the budgeting system was to project earnings for the upcoming year and receive an advance of funds based on the projection from the County. But, if there was a shortfall due to unrealized projected earnings, the site had to return the money out of the following year's budget. Similarly, if there was an excess of revenues over disbursements, the site had to give that to the County too. There was thus absolutely no incentive or opportunity for growth. The Friends also had to go through the County purchasing system in order to spend their money so not only was there delay but they also had to endure the low bid system which meant they didn't always get the contractors or products or services that they would have preferred.¹¹

As soon as the change occurred and the funding was handed to the site to manage, there was an immediate growth in the level of funding. Initially the Friends developed their contributions from \$10,000/year to \$37,000/year when comparing year one and year two under the new accounting system. The museum staff could then put money back into the operation for programming, office furniture, etc. Of great importance to Mr. Braunlein was the direct and positive effect the change had on staff morale at the site, though it was slow at first. "The staff attitudes particularly benefitted from the funding shift when they felt the personal impact with the purchase of new office furniture so that they were no longer sitting on a chair held together with duct tape." Mr. Braunlein also stated that the effect was not just short-term, because he witnessed additional improvements in morale as the benefits of greater funding continued and the staff could trust the situation.

Numerous directors at sites which must cope with public bureaucracies noted that the stability of revenue is a true benefit. They consistently observed, however, that there is a tremendous investment of time in educating public officials about the importance and public benefit of their sites in order to maintain the stream of funds.

Thirteen of the directors indicated the need to raise 50% or more of their funds each year; of those, ten must raise 85% or more in order to operate. The logical question then turns to the level of endowments available to support the ongoing need for unrestricted funding. Endowments can be tricky to assess. Many of them are designated for a very specific use, such that a property may receive an endowment bequest for which

the proceeds may only be used for library conservation. Despite the complications, the directors agreed to provide round figures to describe the many endowment pools at the participating study group properties.

Of thirty-five museum houses, nineteen (54%) have no endowment funds at all. Ten of those who do report funds at less than one million dollars, while only two have funds in excess of a million. Even those properties fortunate enough to have larger endowments indicated that the proceeds from their investments only provide a fraction of the funding necessary to care for and operate the sites. Jennifer Esler at Cliveden explained that, "The general operations budget is inadequate to do more than keep the building open. The place needs the whole package to be running."¹² Even at a property owned by The National Trust for Historic Preservation, the collections care and preservation, building preservation and interpretations are zero-based fund-raising each year. Ms. Esler's approach has been to devise creative ways of accomplishing goals and securing services the property needs to get things done at little or no cost. Ms. Esler shed further light on the myth of grants as a source of operations saying, "grants are usually study money not implementation funding."¹³ Endowment figures are listed in Table 5.

Table 5: Endowment Funding

Property Name	Current Endowment	Best Case Income at 5% Annual Interest	Comments On The Need To Develop an Endowment
Betsy Ross Memorial	\$0	\$0	"No need, we're publicly owned." Theobald Newbold
Colonial Pennsylvania Plantation	\$0	\$0	"It's not really an endowment, but we do have an emergency fund of \$70,000." Jane Humphreys
Dickinson / Albertson Farmstead	\$0	\$0	"We need to develop one." Ella Aderman
Ebenezer Maxwell Mansion	\$0	\$0	
Graeme Park	\$0	\$0	
Harriton House	\$0	\$0	
Historic RittenhouseTown	\$0	\$0	
Hope Lodge	\$0	\$0	
Landmarks: Powel House	\$0	\$0	
Landmarks: Waynesborough	\$0	\$0	
Parson Thorne Mansion	\$0	\$0	"We're working on it." Susan Emory
Pearl S. Buck House	\$0	\$0	
Pennypacker Mills	\$0	\$0	"Publicly owned, so no need for endowment." Roger W. Mower
Pomona Hall	\$0	\$0	
Pottsgrove Manor	\$0	\$0	"Publicly owned, so no need for endowment." Roger W. Mower
Thomas Clarke House	\$0	\$0	
Thomas Massey House	\$0	\$0	
Whitman / Stafford House	\$0	\$0	"No need, really." Frederick Lynch
William Trent House	\$0	\$0	
Rockwood	\$20,000	\$1,000	"There's an endowment drive in process." John H. Braunlein
Fonthill Museum	\$100,000	\$5,000	
Landmarks: Grumblethorpe	\$180,000		
Landmarks: Hill-Physick-Keith House	\$250,000	\$12,500	"We anticipate a bequest of \$25,000 which will be used to establish an endowment for Landmarks, not any specific property." Michael Lane
The Highlands	\$250,000	\$12,500	
Elfreth's Alley	\$290,000	\$14,500	

Table 5: Endowment Funding

Property Name	Current Endowment	Best Case Income at 5% Annual Interest	Comments On The Need To Develop an Endowment
Bartram's Garden	\$300,000	\$15,000	
Wyck	\$300,000	\$15,000	
Pennsbury Manor	\$500,000	\$25,000	
Carpenters' Hall	\$635,000	\$31,750	
George Read II House & Gardens	\$1,500,000	\$75,000	
Cliveden	\$3,050,000	\$152,500	
Stenton	unknown		
Conrad Weiser Homestead	unknown		"There is an endowment, but it is unused, and difficult to access." Kerry Mohn
Hendrickson House	unknown		"I know there is one, but I don't know how much money is in it." Lisa Nichols
Historic Fallsington	unknown		"We have an endowment account, but I have no idea how much it is." Linda Brinker

The logical follow-up to the plight of the properties, since there is not enough endowment funding, is to identify the sources of the money that they do receive. The properties as a whole reported a variety of ways in which they generate revenues, though most indicated a few critical categories. Revenue sources at levels significant enough to report included admissions, annual appeal, investments, grants, memberships, public funding (taxes), gift shop sales, special events, tours, general or board donations, site rentals for private parties or weddings, and rental income from on-site tenants. Some categories are of little interest to a few sites while others may find them quite important. Publicly-funded sites, for example, do not charge admission though they may still make money from special events or rentals. Thirteen sites reported admissions as a revenue source, but only six of those view it as a major source of funds. Eleven properties noted grants as a source, but only seven of them pursued grants as a major revenue stream. Twelve sites mentioned memberships as a stable funding source, but only eight saw it as an important source. The most popular means of generating funds seemed to be special events, with seventeen properties using them as a funding source, and eight indicating that special events are a major factor in their operating budgets. Details on the various revenue sources are reported by property in Table 6.

Table 6: Major Sources of Revenue**Key:** When available, figures are stated as a percentage of the operating budget.

In some cases, relative importance of the category is given by ranking (#1, #2, etc.)

Where neither was indicated by the director, X indicates a major source of funds, and x indicates a lesser source of funding for the property.

Property Name	Admissions	Annual Appeal	Tenant Income	Investment Income	Grants: Corporate & Foundation	Memberships	Public Funding	Site Rentals	Shop Sales	Special Events	Tours	General Donations
Maxwell Mansion	X				X	X				X		X
Wyck	2%			15%	38%				2%	13%		38% ¹
Landmarks		X			X	X		x		x	x	
The Highlands				#1		8%	10%	33%		#3	#2	
Carpenters' Hall				10%		33%		9%	47%			2%
Bartram's Garden	x			x		X			X	X		
Pottsgrove Manor							100%					
Pennypacker Mills							100%					
Rockwood	x					37%	49%	x	x	x		
George Read II House & Gardens	#1				#4			#2	#3			
Stenton					X		x					
Historic RittenhouseTown	X		X		x	x		x				
Pomona Hall					60%	x						x
Thomas Clarke House	x						X			x		
William Trent House							X					
Parson Thorne Mansion	x									x		x
Pearl S. Buck House	x				x			x		x		
Hendrickson House		25%		70%	x							x
Dickinson / Albertson Farmstead					X					X		
Whitman / Stafford House										X		

Table 6: Major Sources of Revenue

Key: When available, figures are stated as a percentage of the operating budget.

In some cases, relative importance of the category is given by ranking (#1, #2, etc.)

Where neither was indicated by the director, X indicates a major source of funds, and x indicates a lesser source of funding for the property.

Property Name	General Donations	Tours	Special Events	Shop Sales	Site Rentals	Public Funding	Memberships	Grants: Corporate & Foundation	Investment Income	Tenant Income	Annual Appeal	Admissions
Pennsbury Manor			#2	#3	#1			#4				
Historic Fallsington										X		
Conrad Weiser Homestead						100%						
Harriton House							25%		25%	50%		
Elfreth's Alley			X	X								X
Thomas Massey House			X			X						
Betsy Ross Memorial						100%						
Colonial Pennsylvania Plantation			X				X					X
Cliveden							x	X	X	x		x
Hope Lodge			x	x		X						
Graeme Park			x	x		X						
Fonthill Museum				X			X					X

1. Specifically refers to board member donations.

In the course of answering questions about their funding sources, the discussion naturally included some additional comments from the participants about their views on fund-raising and how it fits into their role as professional museum directors. Many accepted fund-raising philosophically, such as Ruth M. O'Brien at the Carpenters' Company in Philadelphia, who said, "If I want the place to keep running, and I do, then I must raise the money I need to accomplish the things I want to see happening."¹⁴ Others clearly preferred the stability of public funding. Roger W. Mower working within the tax-supported Montgomery County Department of History and Cultural Arts stated emphatically, "at the County, the money is there and you are not a fund-raiser; you are free to concentrate on the administration, restoration and operation of the sites. I am not a fund-raiser; I am an administrator and historian."¹⁵ Catherine Hoffmann-Lynch at The Highlands described her time invest in fund-raising as, "Tough to pinpoint. It is variable depending upon the time of year and grants due. This is also a function of what Board initiatives develop each year. The decision by the board to pursue a Landscape Master Plan drives my need to find funding to accomplish it and results in more fund-raising time invested." Ms. Hoffman-Lynch stated that the raising of money was not really a task she regretted, so much as her busy schedule at The Highlands made it a challenge to find the time and focus to concentrate on doing it well.

Goal-based funding efforts are frequently evident in the participants' responses to discussions about money. Historic Fallsington's Linda Brinker seemed to tolerate the variability of the funding situation at her site quite well, indicating that her interests were

in the challenges themselves. According to her, “I like problem solving. Getting it done, pulling it off is important. This place calls for that. There's no traditional staff here, we're financially strapped most of the time. We're not traditional.” She indicated a desire to establish a cache of funding to anticipate problems that aren't covered by grants. “There was no documentation of when the last maintenance was done here when I arrived, so no way to predict when things will break down. Cyclical maintenance and the corresponding funds are critical.”

Given the range of the budgets represented in this small sample of properties, some of the directors were asked to comment on what makes a house museum financially viable. John H. Braunlein of Rockwood explained that museum viability is tricky to pinpoint with any overview understanding. “It depends on the site; depends on the level of community support. Every property is different in terms of mission and resources.” While this may be a rational observation, one director became quite impassioned about the one benchmark of viability that she insists upon. Martha Leigh Wolf of Bartram’s Garden was emphatic that properties must not operate with a deficit. She stated that she, “didn't understand this at first but boy do I now. You must take in more than you spend.” Currently she needs a \$500K budget but only has \$100K from predictable sources each year, so she must find new ways to raise the difference in order to pursue any new programming or support services for the property. In Ms. Wolf’s view, “In order to be a good museum you probably need a \$5Mil endowment at a minimum. My current goal is just to have at least a \$1Mil endowment...currently Bartram’s has \$300K only. \$1Mil is

not impossible some day.”¹⁶

Ms. Wolf expressed her frustrations at the general lack of recognition for the amount of money it takes to sustain a site as a house museum. In her view, these sites have failed to receive the reciprocal attention from the preservation community that the museum directors have given to the preservation community.

It seems so ironic that so much of historic preservation is work in the trenches scrambling for money, yet no one wants to do it. And yet, that is real preservation; that is what it's about. But preservationists don't want to get their hands dirty doing this. They all seem to want something like the positions at the Brandywine Conservancy. During my work there, I wrote ordinances, so I know what that side of the profession is all about. But, why don't preservationists understand how hard it is to keep a site going?¹⁷

Directors' Education and Experience

Of the thirty participants, twenty-five (25) have an undergraduate degree; five (5) of the interviewees did not specifically state educational history. Of the twenty-five who did, the majority studied history or related topics at the undergraduate level, and generally confirm that their involvement in historic property management is consistent with their personal interest in history as a discipline. Many of the directors hold a graduate degree, including eight (8) in museum studies; six (6) in historic preservation; and five (5) in other areas of interest. A total of six (6) directors hold or are in pursuit of a second graduate degree in areas to include museum studies (2); art history, education, American history, and law (1 each.) This is an extremely well-educated group of individuals, as detailed in Table 7.

Table 7: Directors' Education

Director & Property	Undergraduate Studies	Graduate Degree #1	Graduate Degree #2
Ritchie Maxwell Mansion	Completed, Institution not stated	Cooper Hewitt Museum Studies Program; Parsons School of Design -- Architectural History; Professional Writing	
Groff Wyck	Bates College, Maine -- History & Anthropology	U. of Wisconsin--MS Architecture	MS Winterthur Program, U of DE; American Decorative Arts
Lane Landmarks	U. of Scranton -- B.S. History	U. of DE -- MS American History; certificate in museum studies	U. of Minnesota MBA
Hoffman-Lynch Highlands	U. of DE -- Art History and American Studies	U. of Pennsylvania -- MS Historic Preservation	
O'Brien Carpenters' Hall	Barnard College -- Architectural History and Botany	Columbia U. -- MS Conservation & Preservation	
Wolf Bartram's Garden	Swarthmore College -- Art History		
Mower Pottsgrove Manor / Pennypacker Mills	U. of Pennsylvania -- History of American Architecture		
Braunlein Rockwood	Yes, Institution not stated	U. of DE -- MS Philosophy	Cooperstown Program in Museum Studies -- MS American Folk Culture
Mullin Read House	Theater & History	Middle TN State U. -- MS History with Preservation Emphasis	

Table 7: Directors' Education

Director & Property	Undergraduate Studies	Graduate Degree #1	Graduate Degree #2
Cooperman Stenton	Yes, Institution not stated	U. of Pennsylvania -- MS Historic Preservation	U. of Pennsylvania -- Ph. Defendant Art History
Frederick RittenhouseTown	BA history, Institution not stated.	MS Bucks County Community College - - Historic Preservation (in progress)	
Wood Pomona Hall	BA Economics & Political Culture, Institution not stated	U. of Pennsylvania - - - MS Folklore & Material Culture	U. of Pennsylvania -- JD
Mills Thomas Clarke House	BA American History, Institution not stated.		
Hermann William Trent House	BA American History, Institution not stated.	U. of DE -- MS American History; Certificate in Museum Studies	
Emory Parson Thorne Mansion	Unknown		
Lelli Pearl S. Buck House	English, Institution not stated		
Nichols Hendrickson House	History, Institution not stated	U. of DE -- MS European History; Certificate in Museum Studies	
Aderman Dickinson/Albertson	Alfred University -- B.F.A. Ceramics	U. of Pennsylvania -- MS Historic Preservation	
Lynch Whitman/Stafford	Degree completed, Institution not stated	MS Education, Institution not stated	Ph. Defendant Education, Institution not stated.

Table 7: Directors' Education

Director & Property	Undergraduate Studies	Graduate Degree #1	Graduate Degree #2
Hemenway Pennsbury Manor	Vanderbilt U. -- BA History	Cooperstown — MA Museum Studies	Temple U. -- Ph. Defendant American History (in progress)
Brinker Historic Fallsington	Temple U. -- BA American Studies		
Mohn Conrad Weiser Homestead	Associates Degree in Business; BA in Secondary Education & Social Studies, Institutions not stated		
Gill Harriton	Moravian College -- BA History & Archeology	George Washington University / Smith -- MA American Civilization	
Petty Elfreth's Alley	U of CA -- BA Art History	Rutgers U. -- MA Museum Studies & Non-Profit Management	
Fitzgerald Thomas Massey House	No information stated		
Newbold Betsy Ross Memorial	B.S. - No further information stated		
Humphreys Colonial Pennsylvania Plantation	Home Economics, No further information stated		
Esler Cliveden	English Literature & American History	U. of DE -- MA American History & Museum Studies	
Reigle Hope Lodge/Graeme Park	History, Institution not stated	Cooperstown — MA Museum Studies	
April Fonthill	U. VA -- BA History	Cooperstown — MA Museum Studies	

These directors are also experienced in a variety of areas which have prepared them for their current responsibilities. While it is quite difficult to determine any pattern of effectiveness related to experience, those directors who demonstrated the greatest depth of knowledge and ability during their interviews tended to combine a variety of experiences. Frequently, this included employment in more than one sector, combining work time in the for-profit sector with management or administrative experience in a governmental agency. There were also many directors with extensive prior experience in the hands-on management of other historic sites, or a related form of non-profit organization, such as a historical society. Four directors mentioned experience at an earlier point in their careers with the National Park Service, while four others indicated experience in the field of education. The complete overview of backgrounds is displayed in Table 8.

Table 8: Directors' Employment Experience

Director & Property	Experience Prior to Current Position
Ritchie Ebenezer Maxwell Mansion	Pittsburgh History & Landmarks Foundation Intern; Preservation Society of Newport Fellowship; Research Intern Marble House; Education Intern, Pennsylvania Museum of Art; 1 year at H. L. Mencken House
Groff Wyck	Philadelphia Maritime Museum Registrar; Real Estate Sales and Director of the Osterville Historical Society on Cape Cod; Writing for Newspapers, Journals and Lectures
Lane Phila. Society for the Preservation of Landmarks	Served as director of an historic property on the campus of the Univ. of MN for 17 years; prior to that, worked in county government in Union County, NJ.
Hoffman-Lynch The Highlands	Caretaker at Stenton; Program Management for National Endowment for the Humanities programs at U. of Penn.
O'Brien Carpenters' Hall	Employed at NY City Landmarks; the Metropolitan Museum of Art; Gracie Mansion and the Seventh Regiment Armory in NYC
Wolf Bartram's Garden	11 years PT in municipal government administration; 11 years with Brandywine Conservancy as a preservation specialist
Mower Pottsgrove Manor / Pennypacker Mills	Teaching of Adults; Assistant principal; 8 years at Bartram's Garden
Braunlein Rockwood	Bureau Chief for the DE Bureau of Museums and Historic Sites; Educator and Curator of the Historical Society of Delaware; Director of the Madison Co. Historical Society in Northern NY; total of 18 years museum. field experience
Mullin Geo. Read II House & Gardens	Dir. Magnolia Mound Historic House Museum in Baton Rouge; Coordinator of Historic House Museum in Del Co. PA; total 12 years before Read House
Cooperman Stenton	4 years Baltimore. Museum. of Art; 2 years university administrator at U. of Arts in Philadelphia; 1 year as writer / researcher in preservation consulting firm

Table 8: Directors' Employment Experience

Director & Property	Experience Prior to Current Position
Zellers - Frederick Historic RittenhouseTown	Trained at Williamsburg VA Historic Sites Administrator Course; 8 years as exec manager for department store; researcher for history -based products retailer; National Park Service experience as well
Wood Pomona Hall	Attorney for 15 years; employed at Old Sturbridge, Volunteered for Independence National Historical Park;
Mills Thomas Clarke House	Tavern Curator in Bennington Vermont; Old Sturbridge Village reenactor
Hermann William Trent House	16 years at small historic sites as director or budget manager in some form
Emory Parson Thorne Mansion	Part-time employment with state museums; guide for the visitors' center in Dover
Lelli Pearl S. Buck House	Private Sector--Public Relations; Banking; Health Care
Nichols Hendrickson House	Instructor & Course Writer for Private Sector Computer Sciences Training Company
Aderman Dickinson/Albertson Farmstead	High School Teacher 11 years; consulting business in preservation 4 years; Interior Design firm currently
Lynch Whitman/Stafford House	Retired HS Principal and industrial arts / vocational teacher
Hemenway Pennsbury Manor	Director, Regional Conference of Historical Agencies, Upstate NY -- providing support training materials supplies for the historical sites in a 28,000 square mile area

Table 8: Directors' Employment Experience

Director & Property	Experience Prior to Current Position
Brinker Historic Fallsington	Asst. Curator Moravian Tile Works; Museum Asst. Fontheill; Special Projects at Mercer Museum
Mohn Conrad Weiser Homestead	Newspaper Distribution & Circulation manager; Banking
Gill Harrington	Athenaeum of Philadelphia; Historic Bethlehem Inc. as properties manager & liaison with builders / architects; prepared their archives for storage & retrieval
Petty Elfreth's Alley	Museum Educator in W. Monmouth NJ; Taught at Brookdale Community College and other private schools; Communications & PR Director at Please Touch Museum; Director of Development at the Library Company; general background in fund-raising and museum education
Fitzgerald Thomas Massey House	Had experience in education and non-profit organizations as a volunteer
Newbold Betsy Ross Memorial	Ran a private metals business; on the board of the Maritime Museum, then as director there; experience and familiarity with fund-raising and good contacts with the board and the foundation community
Humphreys Colonial Pennsylvania Plantation	Extension Home Economist; Homemaker; President of numerous non-profit organizations
Esler Cliveden	Volunteer & summer experience as an interpreter and registrar for Valley Forge; did some consulting for a regional conference of historical agencies in NY; Directed a county historical society for a year
Reigle Hope Lodge / Graeme Park	Asst. to collections administrator for the Fairfax County Park Authority (VA); other experience in research, archival projects , and tour guiding
April Fontheill	National Park Service interpreter; Asst. Dir. of a small site in NJ, and 1st professional at that site

Relationship of Education / Experience to the Position

Did this level of education and experience have a direct effect on the ability of these directors to meet the myriad demands of site management? There is probably no simple answer, though three questions in the survey were designed to learn more about the tangible relationship between what is needed for small site management and what is being taught. The first asked respondents to comment on the differences between their expectations for the field of house museums, compared to what they found to be the reality of the job. The second question inquired about the directors' perceived level of preparation as a result of academic training. Finally, a follow-up question focused the directors on their own views of what should be taught in preparation for directing small museum sites. The resulting discussions struck several consistent themes.

One of the most notable was the stated expectation, prior to employment, that they would spend their days engrossed in what they generally referred to as true museum work. This included the range of activities encompassing registration and cataloging of the collections, curatorial research and preparation of exhibits, and writing scholarly articles or presentations. These are pursuits which require uninterrupted stretches of time and the opportunity to focus on a limited series of tasks or demands on the directors' attention.

Many of the directors discovered, however that their attention was primarily devoted to the dual problems of raising money and general financial management. This constant need to focus on issues related to money was further complicated by the

extraordinary number of competing responsibilities and distractions in their daily responsibilities. One director indicated she had tracked her daily activities and analyzed them to find that her time is spent in increments of three-to-five minutes.¹⁸ The combination of these two issues, money and time, was described as the primary reason that the directors were not actually doing what they had expected.

Several directors observed that both the money and time issues are a direct function of being a small site. House museums have most of the same demands facing larger institutionalized museums, but with a bare fraction of the staff to undertake the range of functions. The result is the need for the executive director to bring not only a broad assortment of skills, but a certain creative flexibility to the task of prioritizing each day's activities.

One good illustration of this problem is the tale told by John M. Groff of a day early in his tenure at Wyck. He arrived to find that the property's dog had run away, escaping through a section of fence that had blown over. Thus instead of a day according to plan, he had to secure the site's perimeter, recover the missing mascot, and return to Wyck only to discover that two tour groups had arrived on a day with no guides scheduled. According to Mr. Groff, prior to his work at the site he had anticipated that eighty percent of his time would be devoted to cataloging, writing articles/books, lecturing, designing and installation of exhibits, and community outreach. He rapidly discovered that he had no idea how much of his time would be devoted to fund-raising, general financial concerns and the day-to-day issues for which even the most talented

individual simply could not begin to plan. As Mr. Groff observed, "So many things happen that mean you must develop general plans and time frames for accomplishments; but you cannot plan your day and be inflexible without becoming stressed and unhappy. I am here by myself a lot and I need to find a way of making time for the research, writing and presenting."¹⁹ Mr. Groff concluded that his original vision of focused collections study and management was perhaps a bit ivory tower, or as he also described it, "that idea is a pipe dream without a large endowment and large staff."

John K. Mills, of the Thomas Clarke House, was similarly articulate in the difference between focus and broad demands as he described his perception of the gap between expectation and reality for work at a small site museum. "The gap has to do with the range of skills and abilities required. At larger museums you get a more narrow focus and support groups you can work with. Smaller sites have such a lack of funds and personnel to get the job done. The title of director at a site like this is not really what you might think of as someone stuck in a closet researching. It is more an issue of changing clothes all the time as you change jobs during the day."²⁰

Though they have obviously come to productive terms with this dilemma, these two directors were by no means alone in their views. At least twelve other participants in this study noted a distinct difference between their anticipation of a career with a narrow focus, only to now find themselves in a position requiring a remarkable breadth of skills and activities. In addition, approximately half of these same respondents were even more specific, explaining that they had expected a more pure distinction between the board and

staff responsibilities for fund raising. In fact, seven of the directors indicated their expectation that the board members would do all the funding work, leaving them free to concentrate on the operations of the site. Much to the contrary, they had discovered that the board did not participate, leaving the executive director to do all the work and worry of raising the funds for the site. Despite the expression by some of raw frustration in their dismay over the level of fund raising to which they must attend, several of the directors were rather philosophical on the subject.

One good example of this was shared by the director at Rockwood. John H. Braunlein indicated that some of his expectations have been on the mark. "You can make a difference--equipped with the right kind of support you can make it work and be responsive to the community. The tempering of my enthusiasm came about due to the grind of finding adequate funding and proper resources. Results here always reflect the basic compromises of life between money and time, what you'd like to do versus what you have to settle for. The lack of staff and money forces everything to be scaled down from what it could be."²¹ It is particularly interesting to note that Rockwood benefits from a steady stream of income from New Castle County, and yet this director still finds himself burdened with a relentless quest for funding. This problem appears to be pandemic, even at the properties with better endowments or public resources to support them.

A third theme marked the distinction between true museum work at a larger institution, as compared to that which is needed at the smaller museum site. This was

consistently expressed in terms of a perceived tightly woven perfection that could be achieved in museum management by following the guidelines as taught in academic programs. The directors, and especially those with prior museum experience in larger institutions, acknowledged that there is very little similarity between this perception, and the reality of daily life at a smaller historic property. Many had adopted a much more relaxed view of what to expect at their sites.

In fact, one veteran of large institutions noted a positive alternative to the contrast between experience in a much more extensive facility and her current work at a small property. According to Emily Cooperman of Stenton in Philadelphia, PA, “With a background in a large municipal institution there were really different expectations. I have come to appreciate things not always looking perfect. It has resulted in a change in my own attitude about what should be expected at the site.”²² Ms. Cooperman indicated her appreciation for what she called benign neglect at Stenton. This phenomenon had resulted in a property which might not meet American Association of Museums (AAM) standards for accreditation, but which had been spared inappropriate or irreversible physical alterations over time. In her eyes this was certainly preferable.

Alice Hemenway of Pennsbury Manor in Morrisville, PA, struck a similar positive chord. “I grew up in a huge institution so I knew early on that there is a golden picture and a reality. Museum life is not all research and glorious exhibits, and I knew that already. As the job gets more complicated, it gets less and less intellectual. That is part of the nature of life and management.”²³

If the job as director evolves to that which is not “true museum work,” what exactly does it entail? Consistently, the interviewees indicated that most of their time was devoted to administrative or clerical activities. Frequently, this category was described by listing--clerical work, banking, deposits, mail, supply purchases, daily correspondence responding to inquiries, assisting with programs if needed, running the gift shop, meetings, writing, calendar development, telephone calling and follow-up after setting wheels in motion. With the extensive and highly intellectual training and experience that the group represents collectively, it is not surprising that this sort of daily responsibility was described by the interviewees in somewhat pejorative terms. Examples include low level administrative things; secretarial paper-pushing; day-to-day petty tasks; dealing with the administrative nonsense; and, all the piddly things.

Following administration, the second major category of activity includes financial management, and fund-raising. This includes planning for the use of future funds (budgeting); tracking the allocation of past and present funds (accounting); and, the planning for and securing of the funds themselves (donor identification and solicitation.)

The third major category of activity which directors of museum properties must handle is that of volunteer management. This responsibility entails the recruitment and training of the house guides; identification and assignment of tasks; scheduling; and, depending on the sophistication of the operation, supervision and performance review. The needs and interests of the unpaid staff must be skillfully balanced with those of paid staff, and the whole personnel management puzzle must ideally work toward the benefit

of the organization's mission. This requires true diplomatic finesse.

When not occupied in these three primary demands, executive directors may be found engaged in numerous other pursuits which they do not include on their list of how they would prefer to spend their time at the property. These include publicity efforts to keep their properties in the public eye; planning, executing, or cleaning up after special events held at or on behalf of the property; as well as completing small-scale or emergency maintenance and repair projects which are never in short supply. Those properties which are publicly-owned carry added responsibilities associated with courting the public bureaucracies of which they are a part. Three of the directors indicated that a specific portion of their time (one day per week in one case) must be dedicated to ongoing education and politicking with their superiors, amounting to a year-round effort to maintain current funding levels for each subsequent fiscal year.

The directors agreed that, while the tasks at hand were the "nuts-and-bolts" necessities of managing the properties, they had many other ideas for how to spend their time. Most often, they mentioned a desire to spend much more time on curatorial projects and collections research. Other preferences leaned toward development of educational programming related to the property; identification and preparation of grant proposals for important projects on-site; more time for long-range planning; and an interest in working more with the interiors and their interpretation.

Only two of the directors specifically noted that they had anticipated the museum world's need for detailed knowledge on curatorial matters, but had failed to anticipate the

extensive call for both business management and people management skills. Jennifer Esler of Cliveden, stated this problem well. “The ethics of the museum profession are really well taught in training programs. The hardest thing is learning the business management. The formal training didn't really match what I've experienced because of that. You need people skills, both for working with the board and with staff, and they require different skills.”²⁴ Though the need for management training did not come up too often in response to this one question, it was consistently mentioned as needed training when the topic later turned to desired course work.

A second general sentiment expressed by the interviewees was the belief that experience in other positions, frequently administrative experience, proved more important as preparation, than did the academic course work they had pursued. Interestingly, there appeared to be a mirror response between those directors trained in a museum studies program and those trained in a preservation program. The individuals educated through a curatorial program felt at a loss for a knowledge of buildings and their systems, while the preservation-trained directors felt inadequately trained in the techniques and details of museum curatorship.

Many of the museum studies graduates indicated that their schooling had given them an important tool for communicating with other professionals in the site management field. As Alice Hemenway pointed out, “Museum training in school provided the intellectual framework for understanding what I do. It provided a common language for communication.”²⁵ Her view was echoed by Jennifer Esler, who noted that

“The current programs train people in basic premises, things that are critical in day-to-day issues. [The graduate programs] are developing a language with respect to future communications.”²⁶

Lisa Nichols, formerly with the Hendrickson House Museum and Old Swedes Church in Delaware, and a museum studies graduate, explained that, “School teaches you to speak the language and understand the systems of the professional museum community. Training in Museum Studies teaches museum methodology. A background in historic preservation focuses on the buildings, not what's in them.” Martha Wolf emphasized the importance of a museum-based training when she said, “ anyone interested in site management needs to get museum training. You need training in operating and managing collections to meet museum standards. Certification lends credibility. You need to be able to be considered a museum professional.”

Despite the importance of common language as a foundation for acceptance as a professional within the museum community, the issue of learning how to handle money-- a skill not taught in the museum and preservation programs--was also key to their recommendation. Many of the participants expressed a similar sense of mismatch between their academic training, and the critical and persistent need for a basic grounding in financial management and other business administration skills. Gayle L. Petty of Elfreth's Alley in Olde City Philadelphia stated the problem well, pointing out that, “There needs to be more practical experience and more emphasis on the management of a site. A curator is not the same thing as a director. You can't care for the site if you can't

manage it. You need to understand financial management. You need to be able to read a spread sheet. You need to understand planned giving and investments because your board may not. If you don't, you need to know where to go to learn about them."²⁷

Recommended Training

Of the directors surveyed, the most consistent call for training, was in the area of business administration and financial management. Twelve of the participants mentioned this need emphatically, and included a specific recommendation that small museum directors need deliberate training in accounting and budgeting. More than one noted that training in the budgeting field should look at both the public and private budgeting procedures, as most site directors will eventually need to work within both areas.

According to Bruce Gill at Harriton House, the first step is to read the Wall St. Journal.

You will need to understand the fundamentals of accounting and business management, even though you don't need to be an actual accountant. You're in business. You may have a mission but many organizations get so wrapped up in the mission that they forget they're running a business. There is some sense that we're not supposed to make money. You've got to understand what makes the world go around. Especially if you're going to attract business supporters.²⁸

Jennifer Esler of Cliveden in Germantown said that she chose her academic program in museum studies because she wanted hands-on objects training, and to learn about how buildings work and the nature of their materials. In retrospect, she found that "What you need is basic small business management through Wharton's small business development; and bookkeeping with not only the details but the understanding of why do

it this way.”²⁹

Less frequently mentioned course work recommendations included the need for museum training or curatorial practices, indicated by seven directors. Carole Wood of Pomona Hall in Camden, New Jersey, observed the need for specialized curatorial training keyed to a given site’s special collections. She explained that, “At those sites that are strictly historic house museums, the director does more curatorial work so course work in objects lends more impact. If the organization has a library or educational programs, it demands further breadth of study.”³⁰ More specifically, Emily Cooperman suggested that curatorial training goes far beyond the basic exposure to art object security and handling. She explained that preparation for site management should include, “basic museum protocols; but human issues are a different thing. Giving tours to people of all ages is fine, but what about handling of life safety and emergency training? Most site staffs don't normally get trained.” Ms. Cooperman’s observation fits well within the issues of visitation as a dual problem of caring for buildings versus protecting and serving the visitors. She indicated her belief that the Americans With Disabilities Act (ADA) regulations will make training in visitor management even more critical and difficult in the future.³¹

Though less prominent, other recommendations included training in people skills or conflict resolution techniques (4 directors mentioned this); funding and grant writing (2); and buildings and building systems (including reading blueprints and specifications) (2); and finally broad generalist abilities rather than a specific focus on a single area.

In fact, two directors were quite thoughtful on this last subject. Alice Hemenway of Pennsbury Manor was especially eloquent. "If a site is like Pennsbury Manor, there is real merit in a generalist's skills. Various subjects will go in and out of fashion, but if push came to shove, I can be my own curator or registrar or director of public relations or education if I had to. I understand the jobs reasonably well, which helps me have a sense of the stresses that are on the employees and helps me have an idea of how much time the jobs require. Some directors are so management oriented that they forget the public. Others are so curatorial they forget the educational component or the preservation component."³²

David April at Fonthill pointed toward his academic background as the source of his generalist training, noting that it has proven effective in his case.

Ever since my work at Cooperstown, I keep asking, did I learn anything? Recently, I went through the training at Williamsburg, but it is hard to quantify. It always seems to be a comparison between the value of being a generalist versus a specialist. This speaks to a larger question: Are we a field or a profession? Therefore I feel ambivalent about my training. Is there a nucleus of knowledge one must know? Is this a distinctive field or a marriage of other specialities? We're striving to become a profession with a national organization which tries to codify ethics, procedures, guidelines, and a definition of what a museum is. But to be a true profession you must sever your ties to the volunteer world. Volunteers are your link to the community, especially for the non-profit world you need good community ties. Here, we're evolving from a volunteer base to a professional base."³³

It is interesting to note that the national organization to which Mr. April referred is the American Association of Museums (AAM), not the National Trust for Historic Preservation (NTHP), or the American Association for State and Local History

(AASLH.) This tends to affirm the idea that despite a genesis in the preservation movement, historic sites tend to identify more with the museum community than the preservation community. Given the statement Ms. Wolf made regarding the lack of understanding or interest by preservationists in these sites, there would appear to be an increasing gap between the museum and preservation professions.

Professional Development

One might reasonably expect to learn from this study group that historic house museum sites are more actively involved in the preservation community than it appears by learning about the professional development efforts of the directors. More specifically, by the very nature of their selections in terms of memberships, further training, and networking with those they identify as their colleagues, these directors create a pattern of preferences. Within this study group, that pattern tends to strengthen the observation that the directors, and hence their properties through their leadership, tend to self-identify as museum people more than as preservationists.

What pursuits do the directors choose as a means of fostering their own professional development? Many of the respondents indicated that they maintain professional memberships in national organizations to include the American Association of Museums (33%), the American Association for State and Local History (19%), and the National Trust for Historic Preservation (24%). Some directors hold memberships in organizations more specific to their interests or the particular needs at their site.

Examples include Mr. Groff's membership in the Society for Architectural Historians, and Ms. Wolf's membership in the National Association of Botanic Gardens.³⁴ Despite the clear recommendations from the group for training and development in the area of financial management, only one director, Gayle Petty at Elfreth's Alley, mentioned membership in an organization that supports this area. Ms. Petty is a member of the National Society of Fund-Raising Executives. (Other directors shore up their fund-raising and financial management skills through workshops more than organizational memberships.)

The bulk of professional memberships tended to focus on regional organizations which have a more direct hands-on effect because they are not quite so far-removed as the national organizations can become. Examples include the Mid-Atlantic Association of Museums, a regional chapter of the AAM (35%); and the Museum Council (28%). The group reported a smattering of memberships in other groups, such as the Pennsylvania Federation of Museums (1), the Tri-State Coalition of Historic Places (2), the Preservation Alliance for Greater Philadelphia (1), and the Association of Living History and Farm Museums (2).

Beyond memberships, many of the directors stated that they actively participate in topical training or seminars that will have a direct bearing on developing the skills they need at their properties. Due to the relentless need for revenues, it is not surprising that they attend a lot of workshops on fund-raising and grant writing. Many study collections care, in an effort to indulge their interests in the objects in their care as well as shoring up

their knowledge of what might be needed at their properties.

A few patterns came to light in the review of the directors' comments regarding professional development. Many set aside at least one day each month to focus on research at their properties, thus thwarting the tide of distractions they face each day. Most of them acknowledged the overwhelming nature of participating in the available organizations. These memberships can be both time-consuming and financially draining, especially since many of the directors can only fund a few, if any, through the property budget. Several of the participants explained that they divided the labor amongst their meager staffs, so that they could participate in more organizations without requiring the lone director to attend each and every meeting.

One interesting aspect of this topic is the potential for depleting the managerial and creative energy of the directors by virtue of constant immersion in the problems of site management. According to Martha Wolf, "Just staying alive, keeping the site going, is all-consuming. Originally, I was on the board of the Chadds Ford Historical Society but I had to give it up. It was just too much of a drain on my emotional reserves to face the pain of the fight to keep Bartram's Garden going all day and then go home to more of the same. It was too depressing. I just had to have some time to not have to deal with those issues."³⁵

The apparent preference, on the part of this study group, for participation in small regional, rather than national organizations, prompted a follow-up question on the possibilities of area-wide associations as a means of strengthening the site museum

community. The directors were asked to comment on both their strengths and shortcomings.

Tangible benefits were immediately obvious. These include the potential for effective coordinated marketing within a logical geographic area; co-operative grant-writing to secure services that an individual site might not be able to afford; the ability to ensure consistency of training to a common level so that all sites move forward together rather than some lagging far behind while others spurt ahead; and the efficiency of sharing known solutions rather than re-inventing the wheel at each site.

Jeff Groff of Wyck is a proponent of joint-marketing as a benefit of regional cooperation. "If sites don't cooperate jointly on programming, tours, calendars, if we all do our own thing we will develop conflicts in events, days of operation, tour promotions and packaging. etc. Together there is leverage--you can use a small amount of money for a brochure and centralize tour bookings."³⁶ One caveat, mentioned by Kerry Mohn at the Conrad Weiser Homestead, "is that not all members participate equally, or are even in a position to do so. For example, organizing a promotion involving free or discounted admissions is tricky if some members already offer standard free admission."³⁷

Timothy Mullin of the George Read II House and Gardens thinks, "this sort of thing is ideal for writing cooperative grant proposals for special projects, especially for very small museums who are frequently ignored by the funders. It also offers the potential for shared contracts for specialist services."³⁸ These thoughts were echoed by Bruce Gill at Harriton House, indicating that through smaller area associations, a site

could achieve disaster plan coordination as well as joint marketing. An umbrella organization of a manageable number of sites means a group may be eligible for technical assistance funding that an individual site might not be able to secure on its own. In his case, the idea was to market all the properties throughout the county, not just one house. His goal was to see the names and brochures for all of them at each end of the turnpike where visitors get an introduction to the county. By pursuing this kind of broad marketing and promotion, in Mr. Gill's view, he can say to a grant agency, 'Look at the bang you get for your buck by backing us!' rather than pleading as a single voice.³⁹

In addition to the many tangible benefits of this type of association, many directors pointed to the intangible results which they saw as of similar importance. These intangibles include the development of mutual psychological support ("I can listen to the others and realize things aren't so bad at my site."⁴⁰) and the counteraction of the perception on the part of some small sites of being left out. John Braunlein expressed this most effectively, saying how much he strongly favors area associations.

They are important for networking and mutual support. There is no need to re-invent the wheel, and interaction with fellow site managers can prevent that through the exchange of ideas and solutions to common problems. Secondly, associations provide a bond by which institutions can promote themselves together. We need to build networks and consortia to develop and grow strong and to make our voices heard. We are seen as the poor cousins in the museum field.⁴¹

The isolation and sense of not fitting in on the part of some small site museums was mentioned by a couple of different study participants in different ways. Lisa Nichols, formerly with the Hendrickson House Museum in Delaware, comment on this in

terms of the value of a museum studies education. “Museum studies gives a balance of the ideals. That’s good but it tends to be based on medium-to-large museums concerning the ‘correct’ procedures. It is based on the kind of places that have entire departments focused on individual issues. You don’t get the ‘how to be creative at a small museum’ lectures, or what to do if you don’t have any form of climate control, what if there is no computer, how do you cope with what you have?” Ms. Nichols indicated that there is a shift in focus at the regional level regarding the place of the small site museum in the hierarchy of the museum community. She observed that there is beginning to be a better focus on small sites. One example she shared indicated that the Mid-Atlantic Association of Museums (MAAM) included a session on small sites at a recent conference. She stated, “Small sites can be more fertile ground in finding new ways to solve old problems. There is a gap between theory or ideals and the reality. It is this gap which leads to creativity.”⁴²

Ella Aderman of the Dickinson / Albertson Farmstead and Jane Humphreys of the Colonial Pennsylvania Plantation both expressed their sense of not fitting in with the traditional house museum crowd. “We are enough out of the realm of the traditional historic house museum that they don’t want anything to do with us,” says Aderman. “We’re a different setup. We are in an under-construction phase so it’s hard to relate us to them. Right now we have hours open only two days a week in addition to booking by appointment. We also don’t fit because most other sites have professional directors, full time.”⁴³ Ms. Humphreys expressed a similar feeling, stating that they have been in the

Museum Council, “but few of their programs coincide with our needs so we don't belong.”⁴⁴

This sentiment was acknowledged by a strong supporter of area associations who recognized the objection as a hidden opportunity rather than an impossible obstacle. According to Alice Hemenway, “The Tri-State Coalition has real potential for allowing the larger sites to work with the smaller sites, to blend strengths, develop skill building, and in a year or two, to develop assistance in terms of marketing. We need to be inculcating an attitude of sharing not superiority. We need to make it clear that everyone has skills to share. The smaller sites have things to teach the larger sites, too.”

Other problems were articulated by the directors, many of which mentioned that the frustrations stem from the time commitment required to participate; administrative overhead that skyrockets as duplicate organizations proliferate; and the individual vested interests of the sites which undermine the cooperative potential of the associations. One director openly stated her cynicism regarding area associations as resume builders in disguise. In her view, every good idea doesn't require a new organization. Her recommendation as a solution is to strengthen a single group and spin committees of specialization off the central organization. Without such an approach, the result, in her experience, has been that there are too many organizations in existence to permit appropriate participation which leads to no participation, and ineffectual organizations.

Gail Petty agreed that currently there is not enough collaboration within the existing regional alliances, especially in terms of cooperative marketing. “There is a fear that the individual site will lose visitation if it helps advertise another site because the

people will go there, and not to your site. In my experience, there is gain through collaboration, not loss. The parkway museums (in Center City Philadelphia) know this. Historic house museums would do better if they tried that, but I don't think they can overcome their fear."⁴⁵

One participant, in particular, discussed her views of area associations from a completely different perspective. In Jennifer Esler's perspective, association is an issue of community outreach as much as participation in museum-based organizations. "The site will not survive without building personal relationships with the community. If we stay within our walls, we won't survive." In her philosophy, participation in other groups is good public relations for her site, and a necessary aspect of the directors' job.

There are two issues that you can't delegate and they are fund-raising and public relations. There are meetings you (the director) must attend and things in which you must participate. There is the problem of the smallest sites feeling disenfranchised therefore associations get the all volunteer groups more engaged, helps distribute information and knowledge they'd not otherwise get. It might help them figure out they need to merge or teach how not to damage things. In so doing, associations such as the Tri-State Coalition raise the overall level of professionalism.

Ms. Esler has demonstrated her beliefs through her activities in the densely urban setting that encompasses Cliveden. Her work has helped expand the surrounding community's acceptance of Cliveden as a neighborhood asset to be enjoyed and cultivated. She has also set the tone for the site as a mentor to other nearby properties, and is currently working to support the startup and development of the neighboring Johnson House as a tourist venue and properly-interpreted museum site. In addition to the community work, her efforts have also included investing time in the Tri-State

Coalition of Historic Places as well as the Museum Council. Her work is a useful example of the many ways in which a director's leadership can position an historic house museum as an anchor in the community and not just a relic of a bygone era.

Vision

According to non-profit management expert Peter F. Drucker, "One of the key tasks of the leader is to balance up the long range and the short range, the big picture and the pesky little details."⁴⁶ Having explored the pesky details with the study group, the directors were then asked to comment on their vision for the properties under their stewardship.

Responses highlight the individuality of each site's resources, location, and level of accomplishment to-date. Only one director had no vision to share, indicating that the site had reached its limit.⁴⁷ Some directors are only in a position to focus on generating money due to the dire nature of current finances and lack of good prospects. The interviewee from Colonial Pennsylvania Plantation was not joking when she said, "To continue to exist is my big goal."

Others are better positioned to balance their plans between financial and non-financial issues. What appears to be the most consistent pattern is one in which the directors who understand the balance tend not to concentrate on money. They tend to focus on broader issues with an underlying confidence that the funding will follow if they get the big picture effectively in place.

One example useful for comparison is the director who consistently commented on the problems of funding as tied too directly to individual board donors. His vision for the site was described as, “To pursue more commercial ventures. Bookstore/gift shop, rentals, more special events that cater to the general public.”⁴⁸ This is a task-based focus with revenue as its sole goal. Compare it to another director’s vision in which the idea of money is not even mentioned:

I clearly see it developing as a research and resource center for study of architecture, decorative arts, garden history, social and cultural history. I am interested in developing national recognition. We are unique because of the completeness of the records here in one site. They are integrated records. It is a niche that not a whole lot of sites can offer. I would not develop this as a connoisseurship site. Other houses can do that better. We have the every day composite of nine generations and how they lived with and used the site and its collections. I recognize that this niche is elitist to an extent in its target because it presumes some basic or foundation level of interest and knowledge/understanding of the site. This (ideally) parallels, rather than supplants, the general availability of the site to the public with the goal of informing, entertaining being personable and warm.⁴⁹

The importance of a realistic assessment of the site’s accomplishments and readiness for the next step was further illustrated by Roger W. Mower, who was able to compare the goals at his former site (Historic Bartram’s Garden) with his current responsibilities at County-funded properties. “At Bartram’s, I wrote a long range master plan to first build a financial base and establish an endowment. They now know where they’re going so it’s time for them to work on the money to get there. It is a different issue in my position with the County where continuing development of the interpretation and educational mission is the issue, so the focus is on review and revision of the stories being told/taught.”⁵⁰

In some cases, vision is centered on a regional or community level. With four properties under his administration scattered throughout the area, Michael Lane sees his organization's role in this light. "There is a good potential for Landmarks to become an umbrella organization for other properties in the Delaware Valley, thus offering economies of scale for daily operations, sharing expertise for property maintenance (of the physical plant), and insight on other organizations in order for other sites to be administered more efficiently."⁵¹ While Mr. Lane's vision sets a course of "nuts-and-bolts" managerial leadership for his organization, Jennifer Esler's vision is tied to community harmony and community economics. "If we [at Cliveden] are only our site, we won't get the attention we deserve. My vision is the creation of a multi-cultural heritage corridor in Germantown. Using history as a vehicle for economic revitalization of urban area so we would not preserve the site for its own sake but as part of larger issues. History as a vehicle to combat racism and a way to drive mutual understanding."⁵²

Others describe their views in more far-reaching terms, looking to the nation as their audience and focusing their vision on national recognition. This is frequently possible in direct proportion to site's place in history. Carpenters' Hall, site of the First Continental Congress at the inception of the American experiment in democracy, is one such example. According to Ruth O'Brien, "This should be a site recognized by school children throughout the United States. It should be an educational experience for multiple populations of visitors. We should have special programming and events to

enhance the experience for children (on a smaller level) and the State (on a broader level)."⁵³

In numerous responses, it the directors expressed their vision in a sequence. Specifically, physical facilities improvements were goals designed to provide for expanded programming; the programming, in turn, was envisioned as a means of driving audience expansion. Jack Braunlein described this in his desire to shift Rockwood from the public perception of the site as only a "Historic House In Suburbia," by improving the facilities to better present its original reality as an estate of 300 acres. This includes the development of trails, restoration of vistas and wooded areas, development of larger activities and programming away from the house and gardens and out on the estate. According to Mr. Braunlein, "This would permit programming aimed at horticulture and people interested in the environment; for example, birders and environmental education for kids. This would expand the dimensions of the museum to the Estate and incorporate a broader audience and range of programming for the community."⁵⁴

This sort of approach, to expand audience by first improving the site and, as a result, expanding programming, was envisioned at an inner-city property (Elfreth's Alley) as well as at the rural Rockwood. Notice, again, that the issue of funding was implied as an end-result, not a goal in itself, despite the director's focus as a professional fund-raiser.

The board and I are pretty much together on vision. We own the house next door to the museum, and over the next five years would like to develop it as part of the museum experience, so it's a more complete site. We'd like to see garden landscaping become part of the interpretation. We want the other more open garden areas to continue to be available for the public and the residents as open green space. It is important that we continue to develop more training for the volunteers. This effort supports

our ability to appeal to more people to be volunteers, and to continue being volunteers. We want to develop better involvement of the residents, help them become more vested in the history of the site. Would like to develop covenants on the houses to protect them through resale. We have a separate endowment specifically for that purpose. And, we want to continue returning funds to the endowments.⁵⁵

A Plan of Action

One measure of leadership in a non-profit organization is the ability to convert ideas into accomplishments. Generally, this is provided for in some document associated with long-range or strategic planning. This document outlines the steps proposed for fulfilling the promise articulated in the organization's vision for itself. Of the thirty directors interviewed, fully 30% stated that there was currently no long-range or strategic planning document for their properties. Despite this, two-thirds of the sites do have road maps for the future, some quite extensive. These plans make themselves felt in different ways.

With an effective plan, some properties have learned from others and have refocused their interests in how to re-develop their sites. Ella Aderman articulated this shift after explaining that the Plymouth Meeting Historical Society, which oversees the Dickinson / Albertson Farmstead, had realigned its views based on an outside planning consultation. Initially, the historical society wanted to develop the property into a living history type museum, complete with furnishings and farm animals. Their renewed approach is to develop the farmstead as a community center with open space both inside and outside. The plan calls for the set-aside of exhibit space for both the Historical Society and other community groups. Their new vision is to develop a site interpretation

based on the evolution of the buildings--to show how they've evolved, what changes have been made and allow the buildings themselves to speak. This will result in an interpretation based on physical architectural evidence, rather than an objects focus. This different approach is what attracted Ms. Aderman, an historic preservation graduate, to the property. She explained the reason for this change in approach by saying, "The Society saw other people's problems and realized it didn't make sense to follow other historic house museum patterns. Even if we had, the documentation about life at the site would have forced an entirely conjectural approach to interpretation. Besides, we wanted space for other things besides furniture. This place is a retreat, a step back in time. But, we want to blend that with useable space."⁵⁶

In other situations, the plan becomes less a tool for major changes in direction, and more a source for guiding and measuring incremental steps forward, as well as for freeing individual staff members to focus on their independent contributions to the property's management. At Cliveden, a long-range plan is re-written each three years with the board in committee structure.

We compare achievement to the last plan and compare objectives. It is not a laundry list but more tied to the mission and the goals for the six major committees. There is a preservation committee whose primary goal is to catch up on deferred maintenance in preparation for the implementation of normal cyclical maintenance. From there, the long-range plan becomes the basis for each staff member's work plan. Each staff member works up one with specific goals. This way, I can base staff evaluations on those plans. The plans lend autonomy to the staff because they know what the overarching objectives are and can devise independent strategies to achieve them. I don't have time to supervise people so I try to hire strongly professional people. My job is to facilitate them in doing their jobs. I can trust them to do what they do best. There is much mutual staff support. Much gets done that I don't even know about, and that reflects on

their competence. My job is to focus on the fund-raising in order to keep them employed.⁵⁷

Measuring Success

With or without a written plan, those directors who are paid for their professional guidance at a historic property museum must be able to define success if they are to evaluate their progress toward it at each site. The survey thus asked the participants to explain how they measure their own success. Responses revealed much about the individual directors and their ability as leaders.

Some definitions of success were in keeping with the financially-strapped or bureaucratically suppressed nature of the properties. As Walter Ritchie said of the chronically cash-poor Maxwell Mansion, "Success would be if we could still keep our doors open. If we could just meet our basic expenses."⁵⁸ At Thomas Clarke House, operated through the State of New Jersey, director John Mills expressed similar low expectations in defining success when he said, "Well, I haven't been fired."⁵⁹ Despite the desperate notes sounded by these comments, most of the directors described quite specific and well-thought out approaches to this issue.

The director at Wyck, John M. Groff, was quick to define success in terms of an educational mission at the property. His methodology for both predicting and measuring accomplishments has become quite precise, a procedure he calls flow charting. This is a method by which Mr. Groff examines the relationship of resource limits, to include paid and unpaid staff hours, actual costs, and time frame. Any new program suggestion must

be defined in terms of the goal; required action steps; implementation required and personnel available for so doing; and budget including both real and staff costs (hourly wage rates are even assigned to volunteer time to evaluate true costs.) According to Mr. Groff, this method has produced outstanding results at Wyck, because the poorer ideas fade away under this analysis, while the ones that stand the scrutiny go on to be successfully implemented. The Flow Charting also provides him with a tool for follow-up evaluation, and helps the entire organization stay focused on activities which they can afford in terms of all their resources.⁶⁰

While this is a truly entrepreneurial approach, and a good example of how to bring private sector ideas to the non-profit sector, other directors focus more on traditional measures. In Michael Lane's definition this means measurement by benchmarks. "These include the number of grants we receive, whether or not our budget has been met, our programs have been provided, our membership retention, the smiles on board members' faces, and if our staff turnover is low."⁶¹

Other responses struck a balance between that expressed by Mr. Lane, specifically several directors defined success at their sites by measurable indices, and especially visitation, while others focused on less tangible issues of visitor enjoyment. The general pattern tended to be related to the motivations given the director by the parent organization. For example, at the Pearl S. Buck House, Nancy Lelli must contend with the fact that the house museum is a tool to help fund the non-museum goals of the parent organization (an international adoption organization), thus "The main goal is maximum visitation in order to preserve the humanitarian/literary legacy of Pearl Buck.

Free publicity is the second goal.”⁶² At the properties funded by Montgomery County, Mr. Mower is responsible for the expenditure of public funds, and must justify his activities to elected officials in terms of how many of the public he serves. His response, therefore, began, “Visitation counts are key. I must stress the importance of tracking this, both for numbers but also to learn why people are coming to your site.” Mr. Mower actively seeks out visitor response and feedback, and evaluates programming by popularity in response and use. At the Conrad Weiser Homestead, owned and operated as a state property, director Kerry Mohn defined success as, “Appearance of the property and the number of visitors. If it's nice and in good shape and we have lots of visitors, it's a success.”⁶³ At the municipally operated Betsy Ross House, there is no apparent measure of success, and the apathy of public management was evident in the comment, “No one really exerts any oversight. There is no checking on our activities other than the time put in. No one questions why attendance has dropped or why we aren't getting the income we projected.”⁶⁴

Despite these restrictive views, at most properties in the study the evaluation of success was broad, and included many different ways of determining progress. At Rockwood, Jack Braunlein explained:

I measure success first by the public's response — this includes visitation counts at tours, special programming, or through written response (unsolicited letters). Last year we conducted a visitor survey, and currently we're in the process of a MAP III grant. The key for me is do people *enjoy* the experience? Secondly, I try to ask if we are moving the institution forward? The restoration of the grounds and buildings, development of new programming for different and diverse audiences, and the development of new handling procedures for the collections are all benchmarks of successfully moving the site and organization forward as a

museum. On a curatorial level, we have progressed from handwritten cards to a computerized collections database over the last two years. We have expanded from only four types of tours to ten different types of school group and adult tours. We are doing more for our audiences. It is frustrating trying to get the word out about the site. We have a low visibility by being in the shadow of much bigger institutions in the area and we lack the funding to advertise and market the site in the way we'd like.

Mr. Braunlein's comments on the importance of visitor enjoyment was repeated by a number of other directors, and frequently linked to education of the visitor as a key accomplishment. In Timothy Mullin's case, follow-up evaluation is an important assessment tool. "Making money is not always the issue. It is important to see if the people are enjoying the programming and participating in it -- not just enough to count bodies and be done with." At the Read House, the staff tries to be responsive to what they learn through evaluating the events. Mr. Mullin noted that one long-standing event has been steadily declining in numbers and seems to have lost its appeal. Consequently, they are cutting back their investment of time and resources in favor of other programs that might have more appeal. He further explained that, "The purpose of the interpretation is for the audience to enjoy the visit. If they don't laugh when on tour, we know we're doing something wrong. After all, we are essentially competing for their entertainment dollars."

At Fonthill Museum in Doylestown, the director admitted that measuring success is something they grapple with all the time. He sees it as complex, and noted that it extends far beyond simple entertainment.

It is similar to the efforts at measuring the national educational system. Sometimes you'll never know if you touch somebody's life. Admissions?

I'm more concerned about what people are leaning. I'm not sure we have a definable way of knowing. We're stimulating peoples' curiosity, either us (through our interpretation) or the site itself. Thanks to Mercer's range of interests and collection, we can mount temporary and changing exhibits related to local history. Thus, we also use it (the house) as a voice for commenting on relevant issues in the community. But, is doing so really bringing in new people? How successful is it? It enables us to do 20th century collecting. Do we bring people back? What about the tourists who don't care about local issues? We must balance the local versus the national. I can see if I get a grant or not. But not getting money can't stand alone as a measure of lack of success. We also look at visitor evaluations — we collect demographic information and analyze it. Are we sometimes unclear about our goals? I have no idea. I'm curious, a little leery about others defining a successful program based on attendance. You can be too concerned with numbers; but, it's hard not to be when it's tied to your revenues. We need a balance of raising money versus meeting our mission. There is a tension between the development office and the educational mission. We rationalize special events versus educational programs in order to distinguish issues that don't have to be related to our mission (such as a concert with a ticket admission) as opposed to a free lecture. We're feeling our way through on this issue at Fonhill.

Perhaps Alice Hemenway best summarized the many responses to the issue of how to measure success at a historic house museum, explaining that it requires awareness of and activity on many different levels.

Ultimately, you measure success at these properties by self-respect. It is an amorphous thing. We're not there, but I know where I want to go. As long as I can see progress on several fronts, even if the progress is uneven overall, that is success. You are never on top of the hill because there is always another one to climb. The hills are curatorial, research, public education, historic preservation, physical plant, visitor services, management and fund-raising. Linked together, they make sense.⁶⁵

Future Trends

If the properties are to be successful, as defined by the harmonious orchestration of so many different measures, it will continue to be important to understand exactly why

people visit them at all. What is the fascination? Three central ideas developed in response to this question. They include the sense of familiarity with the scale of the properties since they were originally homes; a developing interest in real history rather than ersatz replicas; and, the ability of properties to meet a variety of interests both in terms of education and pleasure.

The simple fact that so many house museum sites were originally homes means the structures themselves are familiar. The sizes of rooms, their uses and physical placement in the house, as well as the house's decorative appointments are all details with which visitors can easily identify. Because the scale is human, visitors find it easier to relate to the lives or activities of the historical figures who lived at the site. With experience in both a major art institution, and at smaller historic sites, Ruth M. O'Brien was able to state this well. An historic house "is not as overwhelming as a wide range of paintings in a large art museum for example."

Another director amplified on this theme, noting that the intimate scale and naturally domestic feeling lend to the comfort of the ambiance. "People need a dose of this familiarity; they can identify with historic house museums no matter what period. We are humans and we all want to hear about other humans. Historic house museums meet that need."⁶⁶

Jack Braunlein at Rockwood took this one step further. In his view, there is a sense of accessibility to one's own past. Because of the familiarity of scale, there is a direct relationship between the life that took place in the museum house, and the visitors' comparison to their own private lifestyles. In Mr. Braunlein's words, "It's sort of akin to

the lives of the rich and famous syndrome." In his perspective, this interest holds true, whether the property is associated with the wealthy or those of humble beginnings. "There remains a sense of family and the question of what did they use? The public can relate to the details of daily life."⁶⁷

The ability of the house-visiting public to form individual perceptions and understandings by relating what they see to how they live personally, appears to be contributing to a resurgent interest in "real history" as opposed to new dressed up to look old for purposes of teaching and/or exploitation. Several participants in the interviews mentioned their belief that visitors come to historic house museums specifically to enjoy a sense of history inspired by the sites. According to Andrew Zellers-Frederick, this is part and parcel of the national interest in discovering family roots. "Visitors are fascinated because of the places and their ties to genealogy. People want to know where they come from. The interest in the reality of historic places and people is really developing (as opposed to romantic fantasies of history.)"⁶⁸ The emphasis on reality was mentioned repeatedly, lending credibility to those who, as early as 1959, pointed to the importance of authenticity of a site's structures, decorations, settings, and interpretation.⁶⁹

According to the director at Stenton, Emily Cooperman, the effectiveness of historic house museums derives from the visitor's ability to experience truly old structures and objects in close proximity. "It is physical. Through teaching art history using strictly slides, only about 3% of students become 'engaged' in the works. But when they physically see an object it becomes believable, tangible and they understand so much more."⁷⁰ Ms. Cooperman further points to the current trend in society of collecting

experiences. In her view, the historic house museum is the best representation how to experience history because of the universal ability to relate to the setting and objects. "We all understand houses and how they work," she says.

A third element of the interest in historic houses relates to the sites as resources for learning. This concept of using the properties to educate the visitors is seen as a natural extension of the sense of experiencing something familiar. According to Roger Mower, "People can relate to a real house and what real people were like. It is the social history interpretation that is important. Education is our mission, both through [social] history and [building] restoration. We think of ourselves as educators taking people back in time."⁷¹ But the utility of the sites goes beyond any single lesson. The variety of topics available to educate the public at a given site, provides the opportunity to teach and entertain multiple audiences. Timothy Mullin's opinion of the public's fascination touched on this issue. "They come for different reasons. Some for the love of architecture and an interest in how the place was built and the physical structure. Others are focused on the decorative arts and antiques, not the social history. Our purpose is to teach and document early 19th century social history--heighten awareness and enjoyment. Many people don't want the real history. They want a romantic fantasy of what the history should be like to their way of thinking."

For those sites which are able to tap a narrower range of interests, there may be opportunities to develop a niche audience following. The Ebenezer Maxwell Mansion in Germantown, Pennsylvania, is representative of a specific slice of the Victorian era.

Thus, Walter Ritchie's observation is that the visitors to his site are specifically interested in the narrow time-frame and interpretation of the house's target date of interpretation.⁷²

Museum As Preservation

Is museum status the best way to preserve these properties? What is a better alternative if not? Interviewees had a difficult time with these questions. Many of the directors exhibited a tendency to hedge their comments, noting that *their* site should be a museum, but not every historic house museum should. This was expressed in conjunction with the observation that the Delaware Valley region is perhaps too fortunate in the density of its historically and architecturally significant residential properties.

Numerous themes presented themselves repeatedly in the comments and responses to this question. While some of the interviewees were able to state that they believed museum use was the most appropriate alternative, even they shared in the general sentiment that the region is saturated, with the result that numerous sites have been "saved" only to rot due to a lack of funding for the museum. The proponents of museum status observed that financial constraints on the organization are driving activities at the sites which shift the focus away from the primary museum mission and in favor of revenue generating activities which create undesirable wear-and-tear on the structures. Catherine Hoffman Lynch of The Highlands stated that museum solution was generally the best choice, but not financially sustainable on its own. In her observation it was only the non-museum activities, such as renting the property for parties, or weddings and other outside events, which increasingly had become the primary source of funding

for the museum function at most sites, rather than a supplement to the broader funding mix due to public support for the museum.⁷³ The reason for the shift is all too clear. In the words of Timothy Mullin of the Read House in Delaware, “The building itself should help to produce income to keep it standing. The public thinks all you have to do is open the doors and it’ll pay for itself. But that’s not true.”⁷⁴

In Camden at Pomona Hall, Carole Wood endorsed the museum solution as the best way to preserve historic houses, with the recognition that there may simply be too many in existence. Ms. Wood’s concern over the proliferation of museum properties highlighted the seeming duplication of collections and presentation. Her view is that all house museums look alike after a while. She expanded on this idea to further clarify her concerns regarding site rentals.

I like the idea of restrictive covenants on the properties to permit exploring other opportunities. Rentals for parties or meetings are dangerous. Restrictive covenants encourage the discovery of buyers with an appreciation of what they have. Rentals frequently become a focus. What you need for successful rental space is different from the museum’s needs for space/uses and eventually you lose the fabric of the building. The buildings will need to support themselves in new and different ways. Sales with restrictive covenants is probably the best way. Rentals don’t apply the same appreciation of the buildings. A banquet facility event is destructive. The functional design of a residence is not viable.⁷⁵

Many of the directors who supported the museum solution as the best preservation alternative supported their views with concerns about preventing inappropriate changes to the building fabric. As Linda Brinker of Historic Fallsington pointed out, “Other things have been considered at other sites (cultural center, meeting sites, etc.) but at some sites you can see that museum status has been good for the site. It minimizes the temptations

to slap paint on or rip down walls without any form of control.”⁷⁶ Brenda Reigle of Hope Lodge and Graeme Park, two state-operated sites in Pennsylvania, more bluntly stated this desire for control, also noting the relationship between effectiveness and funding. “If you’re trying to freeze these houses in time, then yes, this is the best way. If your goal is to preserve the structure, then maybe it doesn’t have to be a museum. Yes, museum status is probably the best approach but only with a well-funded endowment.”

The majority of the directors did not endorse creating a museum out of a house as the best approach to preservation. Like David April of Fonthill, those who questioned the choice to create a museum, were not unequivocal in their remarks. They tended to express their concerns in the context of pointing out the many inherent conflicts of museum uses in a former residence.

Museum status? Hard to say. That’s a million dollar question. There are a lot of museums out there. Do we need another one? Is it the best way to preserve a building? I don’t know. In our case, the needs of the collections and those of the structure are very often at odds, and they in turn are at odds with our purposes of education and visitation. The best thing for a collection is not to exhibit them. That’s the classic line. Directors want to exploit the collections to make a buck and that means subjecting the site to as much exposure as possible. Education also implies maximum sensory exposure. So you end up with compromises. There are too many museums. Everyone with a collection thinks it’s significant. There are hundreds of historic house museums in Virginia. Rehabilitation is a more appropriate use. It is best to keep the buildings occupied--to preserve significant features but keep them lived in. This gets into historic preservation, which is not my strength. My interest is education and interpretation, and that’s our main goal. To inspire and teach. We couldn’t do it without the building.⁷⁷

Emily Cooperman of Stenton was less focused on an alternative approach to being a museum, as on the importance of revisiting the definition and setup as a museum.

The problem is we don't have another social category to fit well with these buildings. In a sense there is no other alternative; the idea itself is a hybrid. We need some change in cultural category or else a policy of benign neglect. The role as museum is problematic. There is no value in trying to change them from museums; but maybe we need to re-think them as museums.

And, as if to head off the notion that government control was the answer, John Mills immediately pointed out that, "The State is not always the best at running historic house museums because it usually does the worst job of saving the fabric of the structures."⁷⁸ Ruth M. O'Brien of Carpenters' Hall introduced the notion that life as a museum was possibly best in terms of an interim solution.

There are probably better methods [of preservation]. There are other measures that might be wiser, whether practiced as a long term or temporary measure, such as renting the place to a family as a residence, or opening as a bed-&-breakfast. You lose many sites because the funding is not there. The issue is really to save the site long enough for a better organization or funding system to come along. It is critical that a site not be lost because it was opened to the public when it wasn't prepared to sustain itself as a museum. There is a problem of people acting when not ready.⁷⁹

The concern over long-term financial viability was expressed again and again in terms of rethinking the initial approach to building preservation, as well as the need to accept that not all structures are worthy of preservation. As stated by Alice Hemenway of Pennsbury Manor,

We need to demonstrate that we're economically viable as museums, and very few are. As museums, there is a limited audience and an overly narrow purpose for the site. There may be other ways to legitimately preserve the structure and some buildings should not be preserved. We need to focus on better solutions through adaptive uses; accept that some original uses will never return to a community; and, identify those few which can be viable through a return to their original use.⁸⁰

Most of the directors were comfortable with this sort of thinking. The preferred alternatives repeatedly included restricted alteration through easements and monitoring, and an expanded effort at sensitive adaptive use in ways perceived to be less harmful to the building fabric. Recommendations focused on professional offices, community centers, and sympathetic redevelopment as multi-family housing. Study participants repeatedly said they'd rather see historic houses occupied in any almost any use rather than torn down and lost forever. A typical opinion included the words of Ella Aderman, who said, "I would rather see a building used than in pristine condition and all closed up. A building that is saved but not used is not as valuable. We need these buildings to be functional, but that is hard to implement because so many are already set up as museums. Philadelphia does not need another historic house museum based on the current pattern."⁸¹ And, though many of the directors called for a re-thinking of the museum solution and pointed to the market saturation for such uses, most stopped short of calling for changes that would alter the *status quo*.

This was not true of all the directors, however, who approached the topic as an opportunity to call for a reevaluation of properties with an eye toward future mergers of institutions in order to consolidate structures and collections under fewer entities with stronger centralized leadership. For many, the problem is not whether the time has come to take action, but rather, how to facilitate change through such an admittedly difficult period. Important questions include process issues as well as authority. Summed up by Michael Lane of the Philadelphia Society for the Preservation of Landmarks, many directors are dealing with similar worries.

Should historic properties go bankrupt versus being bailed out, and if so, what would happen? Maybe some organizations need to go out of existence as they're not caring for the property in a true demonstration of fiduciary responsibility. But the other worry is backup is there for the sites if they do fold? Is it better to keep limping or to mothball the sites? I'm not sure, but I think this issue needs to be forced especially to get folks to stop paying lip service and ante up.⁸²

Will closures and mergers be actively sought as a result of enlightened leadership, or will they occur only through a process of attrition as the financial pressures become too great? And, in either case, who makes these decisions? John M. Groff at Wyck put the problem in historical context.

So many sites are the products of organization by good boards who are now elderly individuals with a lack of regeneration. They are the product of the 1920's/30's mentality that every town should have an historic house and exhibit products of local communities. They have become a reliquaries gathering. The alternative is to merge collections to a central location. Merger and dissolution is depressing but if professionals take the lead it is better than a dispassionate court dispersal of assets.⁸³

And Jack Braunlein of Rockwood continued this idea, pointing out that the number and incidence of historic house museums is leveling off and tying his response to a call for action.

We're starting to lose some. They can't all support themselves due to the expensive nature of the operations. Between operating expenses and staff costs what do you do? It can swallow people. The problem seems to be when the museums don't grow out of a plan. What happens is you either lose the museum or you lose any professional staff you might have, which usually amounts to the same thing. There is still a strong interest in historic preservation because an historic house museum tends to involve the community; but, we need a reality factor, and a way to decide which properties to keep this way and which in the future should be made into historic house museums.

As one professional willing to take the lead, Jennifer Esler of Cliveden went on record in the summer of 1996 with the publication of an article outlining the many ways in which house museums might consider new approaches to their role as heritage landmarks. “We need to separate the more important historic houses from the less important historic houses and reevaluate, then shift the uses. It is not just an issue of collaboration but of merging resources. Eventually, we will see the deaccessioning of buildings currently held in the public trust.”⁸⁴ Her outline of new strategies included mergers, consolidations, contractual management agreements, re-creation of the museum role as study properties, adaptive use, and selling the house on the open market with protective covenants in place. Ms. Esler pointed out that, “Past strategies for providing funds to operate these houses are no longer adequate. Management skills that worked in the past may not be appropriate for houses that operate special event location businesses on the side.”⁸⁵

Not alone in her view, it would appear that other directors in the Delaware Valley are beginning to think in terms of new management approaches for the future. In the words of Ella Aderman at the Dickinson / Albertson Farmstead,

Conversion as a historic house museum saves the building, but it is not the only way to do it. We must think through the long term cost and upkeep. If there were more cooperation amongst properties, it would help. Individual groups are so proprietary regarding both their collections and properties. If we consolidated within a county to between one and three repositories, it would make better sense. There is no need for thirty-five places showing the same things. Look at this one county example. There are thirty-four local historical societies. One guy is trying to create a network but everyone wants his own niche. Some people would like to get things more coordinated but it's difficult to do. There are exciting

project possibilities in this area and we must get ourselves in a position to take advantage of them.⁸⁶

What is the Future of Site Museums?

What will it take for the museum properties in the Delaware Valley to reposition themselves to face the future? Most of the respondents included a repeated call for financial self-sufficiency. There is no question that the properties with well-diversified funding sources, creative leadership, and the right mix of location and history, will the survivors in their current guise. The simple fact is grant funding for operating costs and staff salaries is diminishing at the same time that costs keep spiraling. The double-edge of the financing sword is the need to pay for professional leadership (an executive director) in order to develop that well-diversified funding base and keep it going.

Many of the directors expressed this in Darwinian terms as the survival of the fittest. But they extended this definition beyond the position of executive director, to include the need for strength in the ranks of the board leadership, volunteer and paid staff, and general community support. Roger Mower expressed the complexity of the challenge facing the leadership at the properties:

It will require hard work to stay up with current affairs, including trends, shifting public interests, and new technologies. Property staffs will have to be familiar with current methods of historic preservation and conservation, and continually develop new programs of interest to the public. None of us can just sit there and expect people to come to our properties. Thus, there will be an increasing level of importance for marketing and outreach to the surrounding community, both local to the individual house and broader. Historic house museums need to come into this century and be friendly and welcoming which requires public relations, fund-raising and exciting programming.⁸⁷

The demographic changes facing the United States in terms of an aging population will also be a factor at house museums where the leadership is frequently more mature. Andrew Zellers-Frederick observed, “Look at the organizations and their memberships. It is probably elderly, and as they pass on, who will take up the torch? Outreach is critical with respect to getting new members to support the organizations forward into the next decades as volunteers and donors.”⁸⁸

Other directors don’t dispute this approach, but see it as something to be considered as part of a broader plan for the future. Martha Wolf pondered the need for involving youth, as she questioned what role the sites should play in education. Should the historic value be recognized to the extent that the sites become part of the schooling system and their budgets? Or, perhaps, is there a brighter future for museum properties within the burgeoning heritage tourism market? In her view, the need for leadership begins by looking at other major cities and evaluating how they roll historic properties up within their tourism efforts.⁸⁹

Yet, the issue of tourism also presents different paths for historic sites as technology makes new interpretations possible at the same time that the isolation brought on by technological advances makes tourists long for more authentic experiences of the past. John M. Groff questioned this trend.

In five to ten years will historic house museums be eclipsed by Disney History or shopping the outlets? Will people simply sit at home to view the house via CD Rom? There is an opportunity for balance here between using new media (video) as a method of protecting the house and collections from over use. Ultimately, there is something that will be missed. The setting and feeling of the room around you is an integral part of why we save these places and why they’re important.⁹⁰

David April of Fonthill expressed similar concerns regarding the role of technology.

Will technology replace the interest in history? And if so, will it do it by making fake history more fun than the real thing? I think we need to concentrate on developing partnerships and developing alternative reuses other than museums. We need to determine what the government component will be (for example for funding through mechanisms such as Key '93.) Historic house museums are tied to what people feel about history, and public opinion. If they are interested in history, then as people age and feel more nostalgic, they will still find these places a big deal.⁹¹

The perceived future of the sites was not tied directly to the size or prominence of the properties. In many instances, the directors pointed out that the smallest institutions sometimes both possess and are themselves the greatest treasures.⁹² Yet, some of those directors at smaller properties see their situations as calling for safety in numbers. In Carol Wood's perspective,

For the bigger houses, like Cliveden, that can generate tourism and visitation on their own and are located in a city with an established tourism traffic, the properties will continue as they are. The smaller sites will have to band together. Tourism is changing. Visibility and finances will be a struggle for small sites that are not within a central tourist base and will require working together more.⁹³

This call for greater cooperation in management and operations was a central theme of Martha Wolf's vision for the Delaware Valley properties, and fits in with the idea that the best-run sites will survive. In her proposal, the issue of cooperative marketing and management should be a central focus if the properties, regardless of size, are to survive.

I view historic house museums as rich training grounds. The people running them are in a position to advise municipalities and each other about what it will take to run a site, in terms of costs, resources and long-term plans/needs. Historic house museums must form professional alliance marketing groups. The future of Bartram's Garden is the Schuylkill Corridor; for Chadds Ford sites it is the Brandywine River Valley. Sites must band together to create desirable destination areas. They must create big identifiable groups in order to get the attention they'll need to attract people and money.

Despite these more positive big-vision statements, there are some sobering realities to consider, and the "future" for the properties may be at hand sooner than anyone realizes. According to Jane Humphreys of the Colonial Pennsylvania Plantation, "I'm not sure the future is terribly bright. We've been told by our financial committee that we have only two years more at the current rate and then we'll be gone unless we get more funding."⁹⁴

And the financial wolves are not reserving their attack for properties with small budgets. According to David April, at Fonthill--a property with a budget over \$100,000 and 21,000 annual visitors, "What is the future of the limpers? We're one of those, and we have professionals."⁹⁵

Perhaps Brenda Reigle of the Pennsylvania Historical and Museum Commission best summed up the short-term issues that will drive the long-term future for property museums.

The belt tightening is not over. I see no increases in funding coming to any museum any time soon. We must all learn to live within small budgets, and I just don't know if we'll all survive. When can't a property survive? If you can't live up to your basic mission with respect to preserving the building and the collections, then you need to take a close look and form a partnership with someone else or some other site /

organization. The more you know, the better off you are. Good property management is knowledge of collections and their care; of the building and its care; and understanding how to work with people.⁹⁶

Conclusion

This study set out to determine the nature of professional leadership using a study group of historic house museums in the Delaware Valley. Its goal was to identify the relationship between academic preparation and management outcome at the sites. In the process, much was learned about current trends in management and leadership at those sites which participated in the study. The themes that developed throughout produce the answer to the central question.

First and foremost, there was a call among the interviewees for advanced planning and thinking before deciding to turn a house into a museum. The stresses of funding and managing the museum sites brought this plea to near voice-cracking levels that exposed the inherent frustrations of well-trained professionals trying to manage on shoe-string budgets. In the words of Martha Wolf, “Historic house museum management is the ultimate pain and the ultimate ecstasy.”⁹⁷

This leads to a second observation, that the professional executive director will be expected to do it all. From finding the lost dog, to training the volunteer guides; from special event planning to hiring a roofer; from community diplomacy to board politics, and beyond. The desire to cloister oneself in the seclusion of the professional historian and researcher was far removed from the active life of the small site museum director. And, in addition to the many roles the directors found themselves expected to play, the

majority of them had most underestimated that the fund-raising and financial management would prove so relentless and time-consuming.

With this in mind, the issue of training becomes less important as a means of preparation for dealing with the daily needs at the sites, and more important as a means of providing for a common language with fellow site directors. As more professional site museum directors learn to manage the mix of responsibilities, they are able to share experiences with each other more effectively to their mutual benefit. Furthermore, they are better positioned to help less experienced directors avoid the pitfalls of reinventing the wheel of mistakes. Thus, the common language helps all the sites achieve a more advanced position, in theory, because in order for any one site to advance, the leadership at all the sites must talk to each other.

This points to a third observation which the study participants expressed. The leadership at site museums must begin planning for much more integrated marketing, more coordinated management, and more economies of scale. In so doing, the strongest sites will have a much better chance of surviving in the long-term, and the common language of the professional director will facilitate the difficult decisions that will be required in the short-term. In this sense, the 'survival of the fittest' will expand to mean those sites with the best collections (including the house itself) as well as the best and most effective directors and strongest boards. It will require the common language of the professionals to help define these terms in order to sort out and agree upon those sites deemed fit to continue as museums, as well as appropriate alternatives for those sites which will need to change course.

If common language is the benefit of academic preparation, are the property directors all speaking the same language? According to the study participants, there appear to be three areas of core knowledge which contribute to this common language, to include objects, buildings and money. Thus, the two major academic tracks are properly targeting two of the three areas, by teaching about objects, exhibits, and collections care in the museum studies programs and buildings in the historic preservation programs. The missing aspect of funding and financial management appears to be happening as a form of on-the-job-training in most cases. And in many situations, prior experience in administrative positions (especially in a public context), funding and development work, private sector employment, or experience in other museum settings, seemed to have the greatest influence on the behaviors of the study group more than specific education.

With this in mind, does the avenue of academic training matter so very much? Is there any advantage of one discipline over another? Despite the participants' willingness to recognize aspects of their training which they found lacking, only one was specific in her preference for a preservation versus an objects background.

Before I came to this site, the people were caught up in a romantic 1976 version of what a property should be. Through the influence of architects and people with a historic preservation background, the organization came around to more of a preservation approach to historic house museums. The board has shown some reluctance, but it sees it as necessary, a more reasonable approach, a more eclectic approach. Professionals (in historic preservation) understand the broader theory of the properties. It is difficult to get across to the public in general, including some of the people on our board. Historic house museums have perpetuated the more romantic "freeze in time" interpretation, rather than a common approach to preservation and a more broad interpretation. Maybe we were lucky that we were in a position to think through our choices at this site.

In her view, this philosophy may generate more support from funders simply by breaking away from the pattern of tradition. Yet, there are no magic answers, and the responses of a director to the problems of a given property are as individual as the properties themselves.

In fact, training and even experience seemed to have much less to do with the effective management of the sites than those intangible qualities which result in entrepreneurial thinking on the part of a given director.⁹⁸ It is ingenuity, vision, and sheer stamina more than anything, that make for the most effective professional directors. Yet despite the talent and caring that the best bring to the effort, they frequently expressed the sentiment of Jeff Groff that, "There is a persistent feeling that you aren't doing enough, especially if you are the only full-time staff. You can't do it all. There is a general level of anxiety in the historic site community on this level. We all need to step back and recognize what we have accomplished. We must believe in the importance of what we're doing."⁹⁹ Some of the directors are already there, as evidenced by Emily Cooperman's statement that, "given where we are we're doing pretty well. We could do better but we're doing pretty well."¹⁰⁰

As property museums cope with the many problems which challenge their daily survival, the ability to keep moving forward while accepting those accomplishments already achieved will prove no less of a task in the future. As stated in a 1993 letter to the editor of *Museum News*, "Economic pressures are, more and more, calling for ingenuity, resourcefulness, and a business attitude in all aspects of museum management.

There is the talent and experience in the marketplace to deliver them. But ample doses will be needed for some museums to survive as we know them into the 21st century.”¹⁰¹

Appendix: Participants and Property List

Contact Information	Director & Interview Date
Ebenezer Maxwell Mansion 200 W. Tulpehocken St. Germantown, PA 19144 215-438-1861	Walter G. Ritchie 2/16/94
The Wyck Association 6026 Germantown Ave. Philadelphia, PA 19144 215-848-1690	John M. Groff 3/11/94
Philadelphia Society for the Preservation of Landmarks 321 S. Fourth St. Philadelphia, PA 19106 215-925-2251	Michael Lane 2/21/97
The Highlands 7001 Sheaff Ln. Fort Washington, PA 19034 215-641-2687	Catherine G. Hoffman-Lynch 2/02/94
Carpenters' Hall 320 Chestnut St. Philadelphia, PA 19106 215-925-0167	Ruth M. O'Brien 2/07/94
John Bartram Association Historic Bartram's Garden 54th St. & Lindbergh Blvd. Philadelphia, PA 19143 215-729-5281	Martha Leigh Wolf 2/9/94
Pottsgrove Manor West King St. Pottstown, PA 19464 215-326-4014	Defendant Roger Mower, Jr. 2/09/94
Pennypacker Mills 5 Haldeman Rd. Schwenksville, PA 19473 215-287-9349	Defendant Roger Mower, Jr. 2/09/94

Contact Information	Director & Interview Date
Rockwood Museum 610 Shipley Rd. Wilmington, DE 19089 302-571-7776	John H. Braunlein 2/10/94
George Read II House and Gardens Historical Society of Delaware 505 Market St. New Castle, DE 19801 302-655-7161	Timothy J. Mullin 2/10/94
Stenton 18th & Windrim Streets Germantown, PA 19144 215-329-7312	Emily Cooperman 2/10/94
Historic RittenhouseTown 207 Lincoln Dr. Philadelphia, PA 19144 215-438-5711	Andrew A. Zellers-Frederick 2/16/94
Pomona Hall Camden County Historical Society Park Blvd. & Euclid Ave. Camden, NJ 08103 609-964-3333	Carole Wood 2/17/94
Thomas Clarke House 500 Mercer St. Princeton, NJ 08540 609-921-0074	John K. Mills 2/16/94
William Trent House 15 Market St. Trenton, NJ 08611 609-989-3027	Ann Hermann 2/16/94
Parson Thorne Mansion 501 NW Front St. Milford, DE 19963 302-422-3115	Susan Emory 2/24/94

Contact Information	Director & Interview Date
Pearl S. Buck House P.O. Box 181 Green Hills Farm Perkasie, PA 18944 215-249-0100	Nancy Lelli 2/10/94
Hendrickson House Museum and Old Swedes Church 606 Church St. Wilmington, DE 19801 302-652-5629	Lisa A. Nichols 2/11/94
Dickinson / Albertson Farmstead Plymouth Meeting Historical Society 2130 Sierra Road, Box 167 Plymouth Meeting, PA 19462 215-828-8111	Ella Aderman 2/15/94
Whitman - Stafford House 315 Maple Ave. Laurel Springs, NJ 08021 609-784-1105	Frederick Lynch 3/09/94
Pennsbury Manor 400 Pennsbury Memorial Rd. Morrisville, PA 19067 215-946-0400	Alice Plaintiff Hemenway 3/02/94
Historic Fallsington, Inc. Burges-Lippincott House 4 Yardley Ave. Fallsington, PA 19054 215-295-6567	Linda Brinker 3/9/94
Conrad Weiser Homestead R.D. 2, Box 28 Womelsdorf, PA 19567 215-589-2934	Kerry A. Mohn 3/10/94

Contact Information	Director & Interview Date
Harriton House 500 Harriton Rd. P.O. Box 1364 Bryn Mawr, PA 19010 215-525-0201	Bruce Cooper Gill 3/11/94
The Elfreth's Alley Association 126 Elfreth's Alley Philadelphia, PA 19106 215-574-0560	Gayle L. Petty 3/14/94
Thomas Massey House P.O. Box 18 Lawrence & Spring House Road Broomall, PA 19008 215-353-3644	Miriam Fitzgerald 3/9/94
The American Flag House and Betsy Ross Memorial 239 Arch St. Philadelphia, PA 19106 215-627-5343	Theobald T. Newbold 3/10/94
Colonial Pennsylvania Plantation Ridley Creek State Park Media, PA 19064 215-566-1725	Jane Humphreys 3/10/94
Cliveden of the National Trust 6401 Germantown Ave. Philadelphia, PA 19144 215-848-1777	Jennifer Esler 3/17/94
Hope Lodge 553 Bethlehem Pike Fort Washington, PA 19034 215-646-1595	Brenda Reigle 3/28/94
Fonthill Museum East Court Street Doylestown, PA 18901 215-348-9461	David N. April 4/11/94

Notes

1. Gerald George, "Historic Property Museums: What Are They Preserving?" *Forum*: 3, (September 1989): 5.
2. American Association of Museums, *The Official Museum Directory*, 26th ed., vol. 1, (New Providence, NJ: 1996) xiii.
3. Peggy Coats, "Survey of Historic House Museums," *History News* 45 (January / February 1990) 27.
4. Martha Leigh Wolf, Telephone interview with author, Philadelphia, PA, 9 Feb., 1994.
5. Catherine G. Hoffman-Lynch, Telephone interview with author, Philadelphia, PA, 2 Feb., 1994.
6. John. M. Groff, Interview with author. Philadelphia, PA, 11 Mar., 1994.
7. Gayle L. Petty, Telephone interview with author, Philadelphia, PA, 14 Mar., 1994.
8. John. M. Groff, Interview with author. Philadelphia, PA, 11 Mar., 1994.
9. Theobold T. Newbold, Interview with author, Philadelphia, PA, 10 Mar., 1994.
10. Theobold T. Newbold, Interview with author, Philadelphia, PA, 10 Mar., 1994.
11. John H. Braunlein, Telephone interview with author, Wilmington, DE, 10 Feb., 1994.
12. Jennifer Esler, Interview with author, Philadelphia, PA, 17 Mar., 1994.
13. Jennifer Esler, Interview with author, Philadelphia, PA, 17 Mar., 1994.
14. Ruth M. O'Brien, Telephone interview with author, Philadelphia, PA, 7 Feb., 1994.
15. Defendant Roger Mower, Jr., Telephone interview with author, Pottstown, PA, 9 Feb., 1994.
16. Martha Leigh Wolf, Telephone interview with author, Philadelphia, PA, 9 Feb., 1994.

17. Martha Leigh Wolf, Telephone interview with author, Philadelphia, PA, 9 Feb., 1994.
18. Jennifer Esler, Interview with author, Philadelphia, PA, 17 Mar., 1994.
19. John. M. Groff, Interview with author. Philadelphia, PA, 11 Mar., 1994.
20. John K. Mills, Telephone interview with author. Philadelphia, PA, 16 Feb., 1994.
21. John H. Braunlein, Telephone interview with author, Wilmington, DE, 10 Feb., 1994.
22. Emily Cooperman, Telephone interview with author, Philadelphia, PA, 10 Feb., 1994.
23. Alice P. Hemenway, Telephone interview with author, Morrisville, PA, 2 Mar., 1994.
24. Jennifer Esler, Interview with author, Philadelphia, PA, 17 Mar., 1994.
25. Alice Plaintiff Hemenway, Telephone interview with author, Morrisville, PA, 2 Mar., 1994.
26. Jennifer Esler, Interview with author, Philadelphia, PA, 17 Mar., 1994.
27. Gayle L. Petty, Telephone interview with author, Philadelphia, PA, 14 Mar., 1994.
28. Bruce Cooper Gill, Telephone interview with author, Bryn Mawr, PA, 11 Mar., 1994.
29. Jennifer Esler, Interview with author, Philadelphia, PA, 17 Mar., 1994.
30. Carole Wood, Telephone interview with author, Camden, NJ, 17 Feb., 1994.
31. Emily Cooperman, Telephone interview with author, Philadelphia, PA, 10 Feb., 1994.
32. Alice Plaintiff Hemenway, Telephone interview with author, Morrisville, PA, 2 Mar., 1994.
33. David N. April, Telephone interview with author, Doylestown, PA, 11 Apr., 1994.

34. Mr. Groff includes research into the architectural history of the Main Line Philadelphia estates as one of his personal areas of interest. Wyck also generates significant amounts of revenue tied to its annual architectural award, The Wyck-Strickland Award. Ms. Wolf's participation in the National Association of Botanic Gardens is directly tied to the Bartram's Garden site as the nation's earliest botanic garden.
35. Martha Leigh Wolf, Telephone interview with author, Philadelphia, PA, 9 Feb., 1994.
36. John. M. Groff, Interview with author. Philadelphia, PA, 11 Mar., 1994.
37. Kerry A. Mohn, Telephone interview with author, Womelsdorf, PA, 10 Mar., 1994.
38. Timothy J. Mullin, Telephone interview with author, New Castle, DE, 10 Feb., 1994.
39. Bruce Cooper Gill, Telephone interview with author, Bryn Mawr, PA, 11 Mar., 1994.
40. Timothy J. Mullin, Telephone interview with author, New Castle, DE, 10 Feb., 1994.
41. John H. Braunlein, Telephone interview with author, Wilmington, DE, 10 Feb. 1994.
42. Lisa A. Nichols, Telephone interview with author, Wilmington, DE, 11 Feb., 1994.
43. Ella Aderman, Telephone interview with author, Plymouth Meeting, PA, 15, Feb., 1994.
44. Jane Humphreys, Telephone interview with author, 10 Mar., 1994.
45. Gayle L. Petty, Telephone interview with author, Philadelphia, PA, 14 Mar., 1994.
46. Peter F. Drucker, *Managing the Non-Profit Organization* (New York: HarperCollins Publishers, 1990), 23.

47. "Long term we are living up to the maximum use that the property can handle right now. Without alternative expansion, we have reached our limit for growth." Bruce Cooper Gill, Telephone interview with author, Bryn Mawr, PA, 11 Mar., 1994.
48. "In August of 1992, Maxwell Mansion had \$50.00 in the checking account. The Board's response was, 'Oh that's typical.' There has been a previous reliance on Board member donations each time this happened. So, I've developed another priority which is not to approach the Board for funds necessary for basic survival." Walter G. Ritchie, Telephone interview with author, Philadelphia, PA, 16 Feb., 1994.
49. John. M. Groff, Interview with author. Philadelphia, PA, 11 Mar., 1994.
50. D. Roger Mower, Jr., Telephone interview with author, Pottstown, PA, 9 Feb., 1994.
51. Michael Lane, Telephone interview with author, Philadelphia, PA, 21 Feb, 1997.
52. Jennifer Esler, Interview with author, Philadelphia, PA, 17 Mar., 1994.
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59. John K. Mills, Telephone interview with author. Philadelphia, PA, 16 Feb., 1994.
60. John. M. Groff, Interview with author. Philadelphia, PA, 11 Mar., 1994.

61. Michael Lane, Telephone interview with author, Philadelphia, PA, 21 Feb, 1997.
62. Nancy Lelli, Telephone interview with author, Perkasio, PA, 10 Feb., 1994.
63. Kerry A. Mohn, Telephone interview with author, Womelsdorf, PA, 10 Mar., 1994.
64. Theobald T. Newbold, Interview with author, Philadelphia, PA, 10 Mar., 1994.
65. Alice Plaintiff Hemenway, Telephone interview with author, Morrisville, PA, 2 Mar., 1994.
66. Martha Leigh Wolf, Telephone interview with author, Philadelphia, PA, 9 Feb., 1994.
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68. Andrew A. Zellers-Frederick, Interview with author, Philadelphia, PA, 16 Feb., 1994.
69. Montgomery, Charles F. "The Historic House - A Definition." *Museum News* 38 (September 1959) 13.
70. Emily Cooperman, Telephone interview with author, Philadelphia, PA, 10 Feb., 1994.
71. D. Roger Mower, Jr., Telephone interview with author, Pottstown, PA, 9 Feb., 1994.
72. Walter G. Ritchie, Telephone interview with author, Philadelphia, PA, 16 Feb., 1994.
73. Catherine G. Hoffman-Lynch, Telephone interview with author, Philadelphia, PA, 2 Feb., 1994.
74. Timothy J. Mullin, Telephone interview with author, New Castle, DE, 10 Feb., 1994.
75. Carole Wood, Telephone interview with author, Camden, NJ, 17 Feb., 1994.
76. Timothy J. Mullin, Telephone interview with author, New Castle, DE, 10 Feb., 1994.

77. David N. April, Telephone interview with author, Doylestown, PA, 11 Apr., 1994.
78. John K. Mills, Telephone interview with author. Philadelphia, PA, 16 Feb., 1994.
79. Ruth M. O'Brien, Telephone interview with author, Philadelphia, PA, 7 Feb., 1994.
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81. Ella Aderman, Telephone interview with author, Plymouth Meeting, PA, 15, Feb., 1994.
82. Michael Lane, Telephone interview with author, Philadelphia, PA, 21 Feb, 1997.
83. John. M. Groff, Interview with author. Philadelphia, PA, 11 Mar., 1994.
84. Jennifer Esler, Interview with author, Philadelphia, PA, 17 Mar., 1994.
85. Jennifer Esler, "Historic House Museums: Struggling For Survival," *Forum* 10 (Summer 1996): 50.
86. Ella Aderman, Telephone interview with author, Plymouth Meeting, PA, 15, Feb., 1994.
87. Defendant Roger Mower, Jr., Telephone interview with author, Pottstown, PA, 9 Feb., 1994.
88. Andrew A. Zellers-Frederick, Interview with author, Philadelphia, PA, 16 Feb., 1994.
89. Martha Leigh Wolf, Telephone interview with author, Philadelphia, PA, 9 Feb., 1994.
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92. Catherine G. Hoffman-Lynch, Telephone interview with author, Philadelphia, PA, 2 Feb., 1994.
93. Carole Wood, Telephone interview with author, Camden, NJ, 17 Feb., 1994.

94. Jane Humphreys, Telephone interview with author, Media, PA 10 Mar., 1994.
95. David N. April, Telephone interview with author, Doylestown, PA, 11 Apr., 1994.
96. Brenda Reigle, Telephone interview with author, Fort Washington, PA, 28 Mar., 1994.
97. Martha Leigh Wolf, Telephone interview with author, Philadelphia, PA, 9 Feb., 1994.
98. Ann Graham Ehringer, *Make Up Your Mind: Entrepreneurs Talk About Decision Making*, Santa Monica, CA: Merritt Publishing, 1995), 321-333.
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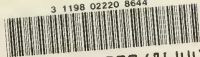


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